



I100 Integration Scenarios

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Timing and Agenda

April 3, 2023 -10:00-11:30 AM

Day 1

Lesson 1.1: Creating a File Provider

Lesson 1.2: Creating a Microsoft SQL Provider

Lesson 2.1: Importing New Master Records

Lesson 2.2: Updating Records by Using IDs

April 4, 2023 -10:00-11:30 AM

Day 2

Lesson 2.3: Deleting Incorrectly Imported Records

Lesson 2.4: Working with Auto-Numbered Imported Records

Lesson 2.5: Working with Master-Detail Records

Timing and Agenda

April 5, 2023 -10:00-11:30 AM

Day 3

Lesson 2.6: Importing Records with Attributes

Lesson 3.1: Importing Records in the Simplified Way

Lesson 4.1: Exporting Records

April 6, 2023 -10:00-11:30 AM

Day 4

Lesson 4.2: Modifying Records By Using Export Scenarios

Lesson 5.1: Optimizing the Performance of Data Import

Lesson 6.1: Scheduling Data Import and Export



Part 1: Data Providers

Part 2: Import Scenarios

Part 3: Simplified Import Scenarios

Part 5: Performance Optimization

Part 6: File Synchronization

Day 1

Lesson 1.1: Creating a File Provider

Learning Objectives

In this lesson, you will learn how to do the following:

- Create and configure a CSV provider
- Create and configure an Excel provider
- Modify a file provider
- Link a file provider to an existing file

Figure: CSV provider parameters

Data Providers NOTES FILES (1) CUSTOMIZATION TOOLS ▾

GET FILE LINK

* Name:

* Provider Type:

☒ Active

PARAMETERS SCHEMA

RELOAD PARAMETERS

		Name	Description	Value
		FileName	File Name	Data Providers (Import/Export Customers)\CustomersMasterFile.csv
		Encoding	Encoding	Unicode (UTF-8)
		Delimiter	Default Delimiter	;
>		QuoteAll	Enclose all values in double quotes	False

Figure: The schema of the Import/Export Customers data provider

Data Providers

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

GET FILE LINK

* Name: Import/Export Customers

* Provider Type: CSV Provider

PARAMETERS SCHEMA

Source Objects

⌂ + × FILL SCHEMA OBJECTS ↗

⌂	🔍	🔍	Active	* Object	Command
>	🔍	🔍	<input checked="" type="checkbox"/>	CustomersMasterFile.csv	

Source Fields

⌂ + × FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION |←|

⌂	🔍	🔍	Active	Field	Key	Description	Data Type	Data Length	Command
>	🔍	🔍	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>	CUSTOMER ID	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	CUSTOMER NAME	<input type="checkbox"/>	CUSTOMER NAME	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>	CUSTOMER CLASS	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	CITY	<input type="checkbox"/>	CITY	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	COUNTRY	<input type="checkbox"/>	COUNTRY	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	STATE	<input type="checkbox"/>	STATE	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	ADDRESS LINE 1	<input type="checkbox"/>	ADDRESS LINE 1	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	PHONE 1	<input type="checkbox"/>	PHONE 1	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	FIRST NAME	<input type="checkbox"/>	FIRST NAME	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	LAST NAME	<input type="checkbox"/>	LAST NAME	String	-1	
	🔍	🔍	<input checked="" type="checkbox"/>	EMAIL	<input type="checkbox"/>	EMAIL	String	-1	

Figure: The schema of the Import/Export AR Invoices data provider

Data Providers

NOTES FILES (1) CUSTOMIZATION TOOLS

GET FILE LINK

* Name: Import/Export Customers

* Provider Type: CSV Provider

PARAMETERS SCHEMA

Source Objects

Acti	Object	Command
<input checked="" type="checkbox"/>	CustomersMasterFile.csv	

Source Fields

Active	Field	Key	Description	Data Type	Data Length	Command
<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>	CUSTOMER ID	String	-1	
<input checked="" type="checkbox"/>	CUSTOMER NAME	<input type="checkbox"/>	CUSTOMER NAME	String	-1	
<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>	CUSTOMER CLASS	String	-1	
<input checked="" type="checkbox"/>	CITY	<input type="checkbox"/>	CITY	String	-1	
<input checked="" type="checkbox"/>	COUNTRY	<input type="checkbox"/>	COUNTRY	String	-1	
<input checked="" type="checkbox"/>	STATE	<input type="checkbox"/>	STATE	String	-1	
<input checked="" type="checkbox"/>	ADDRESS LINE 1	<input type="checkbox"/>	ADDRESS LINE 1	String	-1	
<input checked="" type="checkbox"/>	PHONE 1	<input type="checkbox"/>	PHONE 1	String	-1	
<input checked="" type="checkbox"/>	FIRST NAME	<input type="checkbox"/>	FIRST NAME	String	-1	
<input checked="" type="checkbox"/>	LAST NAME	<input type="checkbox"/>	LAST NAME	String	-1	
<input checked="" type="checkbox"/>	EMAIL	<input type="checkbox"/>	EMAIL	String	-1	

Figure: Schema of the Import/Export AR Invoices data provider

Data Providers ☆

GET FILE LINK

* Name: Import/Export AR Invoices

* Provider Type: Excel Provider

☒ Active

PARAMETERS SCHEMA

Source Objects

FILL SCHEMA OBJECTS ?

Active	*Object	Command
<input checked="" type="checkbox"/>	AR Invoices	
<input type="checkbox"/>	Sheet1	
<input type="checkbox"/>	Sheet2	

Source Fields

FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION |<| ☒

Active	Field	Key	Description	Data Type
<input checked="" type="checkbox"/>	DOC TYPE	<input type="checkbox"/>	DOC TYPE	String
<input checked="" type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>	INVOICE REF NBR	String
<input checked="" type="checkbox"/>	LINE NBR	<input type="checkbox"/>	LINE NBR	String
<input type="checkbox"/>	LINE NBR (formula)	<input type="checkbox"/>	LINE NBR (formula)	String
<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>	CUSTOMER ID	String
<input checked="" type="checkbox"/>	DATE	<input type="checkbox"/>	DATE	String
<input checked="" type="checkbox"/>	POST PERIOD	<input type="checkbox"/>	POST PERIOD	String
<input checked="" type="checkbox"/>	ORIGINATING BRANCH	<input type="checkbox"/>	ORIGINATING BRANCH	String
<input checked="" type="checkbox"/>	CUSTOMER REF NBR	<input type="checkbox"/>	CUSTOMER REF NBR	String
<input type="checkbox"/>	DOC DESCRIPTION (formula)	<input type="checkbox"/>	DOC DESCRIPTION (formula)	String
<input checked="" type="checkbox"/>	DOC DESCRIPTION	<input type="checkbox"/>	DOC DESCRIPTION	String
<input checked="" type="checkbox"/>	LINE DESCRIPTION	<input type="checkbox"/>	LINE DESCRIPTION	String
<input type="checkbox"/>	LINE DESCRIPTION (formula)	<input type="checkbox"/>	LINE DESCRIPTION (formula)	String
<input checked="" type="checkbox"/>	EXT PRICE	<input type="checkbox"/>	EXT PRICE	String
<input checked="" type="checkbox"/>	TOTAL AMOUNT	<input type="checkbox"/>	TOTAL AMOUNT	String
<input checked="" type="checkbox"/>	ACCOUNT	<input type="checkbox"/>	ACCOUNT	String
<input checked="" type="checkbox"/>	SUBACCOUNT	<input type="checkbox"/>	SUBACCOUNT	String
<input checked="" type="checkbox"/>	DESTINATION BRANCH	<input type="checkbox"/>	DESTINATION BRANCH	String

Figure: Import Stock Items provider schema

Data Providers ☆

📁 ↶ + 🗑️ 📄 ◀ ▶ > GET FILE LINK

* Name: 🔍

* Provider Type: 🔍

☒ Active

PARAMETERS **SCHEMA**

Source Objects

🔄 + ✕ FILL SCHEMA OBJECTS ?

📄	🔍	🗑️	Active	Object	Command
>	🔍	🗑️	<input checked="" type="checkbox"/>	Leads	

Source Fields

🔄 + ✕ FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION |⇌| ☒

📄	🔍	🗑️	Active	Field	Key	Description	Data Type
>	🔍	🗑️	<input checked="" type="checkbox"/>	Name	<input type="checkbox"/>	Name	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Company Name	<input type="checkbox"/>	Company Name	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Position	<input type="checkbox"/>	Position	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Source	<input type="checkbox"/>	Source	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Status	<input type="checkbox"/>	Status	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Email	<input type="checkbox"/>	Email	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Phone 1	<input type="checkbox"/>	Phone 1	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Country	<input type="checkbox"/>	Country	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Lead Class	<input type="checkbox"/>	Lead Class	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Attribute	<input type="checkbox"/>	Attribute	String
	🔍	🗑️	<input checked="" type="checkbox"/>	Value	<input type="checkbox"/>	Value	String

Lesson Summary

In this lesson, you have learned how to create CSV and Excel file providers. In the process, you have learned that the procedure is similar for both types of file data providers. Below is the summary of the main steps you have completed to create each file provider:

1. Reviewing the source file to determine the needed provider type, to check that the file meets the requirements, and to see the schema that should be uploaded to the data provider.
2. Creating a data provider in the system and specifying its type.
3. Attaching the source file to the newly created provider and correcting the parameters of the data provider, if necessary.
4. Specifying the objects and fields of the provider.

Now the data providers are ready for use in integration scenarios.

Lesson 1.2: Creating a Microsoft SQL Provider

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a Microsoft SQL provider and specify the connection parameters for it
- Use SQL SELECT statements and SQL functions to override schema objects

Figure: Active fields of the POExt object

Data Providers

NOTES FILES CUSTOMIZATION TOOLS

GET FILE LINK

* Name: Import Purchase Orders
* Provider Type: MS SQL Provider
☒ Active

PARAMETERS SCHEMA

Source Objects

	Acti	*Object	Command
>	<input checked="" type="checkbox"/>	POExt	
	<input type="checkbox"/>	POLineExt	

Source Fields

	Acti	Field	Key	Description	Data Type	Data Length	Command
>	<input checked="" type="checkbox"/>	Type	<input type="checkbox"/>	Type	String	255	
	<input checked="" type="checkbox"/>	VendorID	<input type="checkbox"/>	VendorID	String	255	
	<input checked="" type="checkbox"/>	Date	<input type="checkbox"/>	Date	DateTime	8	
	<input checked="" type="checkbox"/>	DocumentReference	<input type="checkbox"/>	DocumentReference	String	255	

NOTES FILES CUSTOMIZATION TOOLS

Data Providers

GET FILE LINK

* Name: Import Purchase Orders
* Provider Type: MS SQL Provider
☒ Active

PARAMETERS SCHEMA

Source Objects

	Acti	*Object	Command
>	<input checked="" type="checkbox"/>	POExt	
	<input checked="" type="checkbox"/>	POLineExt	

Source Fields

	Acti	Field	Key	Description	Data Type	Data Length	Command
>	<input checked="" type="checkbox"/>	DocumentReference	<input type="checkbox"/>	DocumentReference	String	255	
	<input checked="" type="checkbox"/>	Warehouse	<input type="checkbox"/>	Warehouse	String	255	
	<input checked="" type="checkbox"/>	VendorInventoryID	<input type="checkbox"/>	VendorInventoryID	String	255	
	<input checked="" type="checkbox"/>	Quantity	<input type="checkbox"/>	Quantity	Double	8	

Figure: The Edit Command button

Data Providers

NOTES FILES CUSTOMIZATION TOOLS

GET FILE LINK

* Name: Import Purchase Orders

* Provider Type: MS SQL Provider

☒ Active

PARAMETERS SCHEMA

Source Objects

Source Fields

EDIT COMMAND

Fit to Screen

Field	Key	Description	Data Type	Data Length	Command
Type	<input type="checkbox"/>	Type	String	255	
VendorID	<input type="checkbox"/>	VendorID	String	255	
Date	<input type="checkbox"/>	Date	DateTime	8	
DocumentReference	<input type="checkbox"/>	DocumentReference	String	255	

Figure: Object Command Editor dialog box

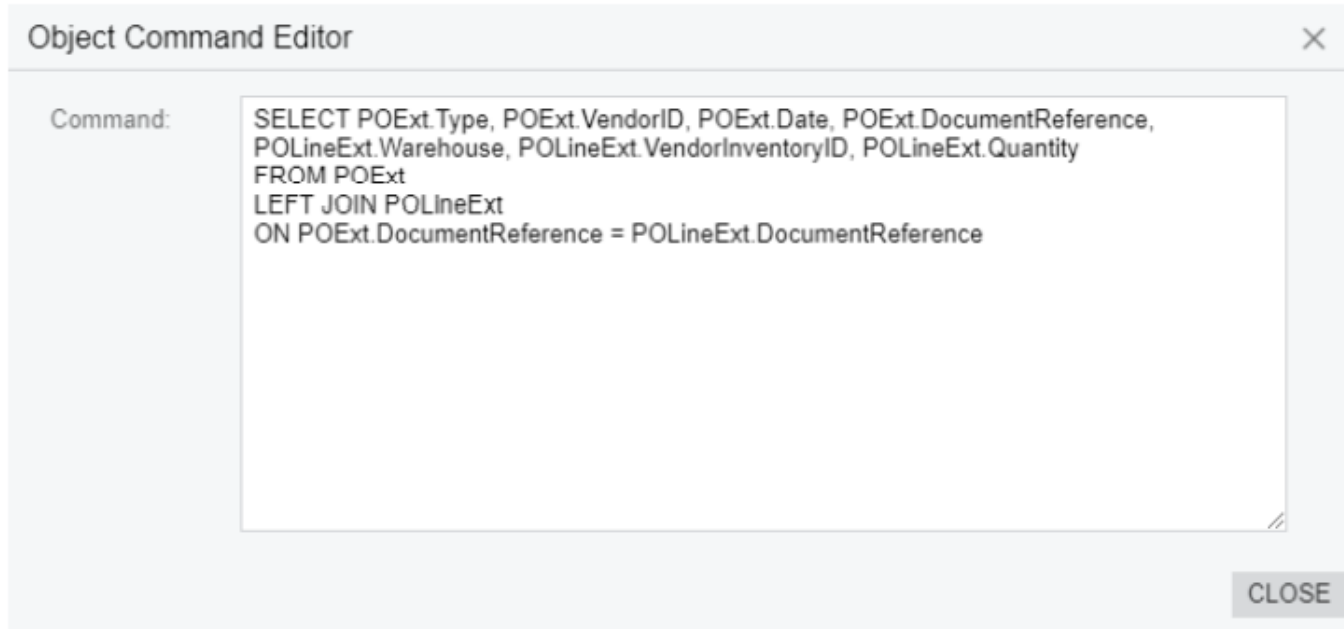


Figure: Import Purchase Orders provider schema

Data Providers

NOTES FILES CUSTOMIZATION TOOLS ▾

GET FILE LINK

* Name: Import Purchase Orders

* Provider Type: MS SQL Provider

☒ Active

PARAMETERS SCHEMA

Source Objects

FILL SCHEMA OBJECTS

Object	Command
POExt	SELECT POEx...
POLineExt	

Source Fields

FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION

Field	Key	Description	Data Type	Data Length	Command
Type		Type	String	255	
VendorID		VendorID	String	255	
Date		Date	DateTime	8	
DocumentReference		DocumentReference	String	255	
Warehouse		Warehouse	String	255	
VendorInventoryID		VendorInventoryID	String	255	
Quantity		Quantity	Double	8	

Lesson Summary

In this lesson, you have learned how to create a Microsoft SQL provider. To create a Microsoft SQL provider, you have specified the location of the Microsoft SQL Server instance and connection parameters, and have populated the schema objects and fields from the server. SQL commands and functions can be used to override the objects.

Lesson 2.1: Importing New Master Records

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a scenario for importing new records
- Import records by using the created scenario

Figure: Customers form

Customers
CUSTOMER11 - Elite Answering

NOTES FILES CUSTOMIZATION TOOLS

VIEW ACCOUNT

* Customer ID: CUSTOMER11
* Customer Status: Active
* Customer Class: DEFAULT - Default

Balance: 0.00
Prepayment Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES

ACCOUNT INFO
* Account Name: Elite Answering

ACCOUNT ADDRESS
VIEW ON MAP
Address Line 1: 111 Penn Plz
Address Line 2:
City: New York
State: NY - NEW YORK
Postal Code:
* Country: US - United States of America

ADDITIONAL ACCOUNT INFO
Business 1: +1 (777) 423-6750
Business 2:
Fax:
Account Email: help@elite-answer.com
Web:
Ext Ref Nbr:

PRIMARY CONTACT
Name: Leslie Graff
Job Title:
Email:
Business 1
Cell

CONTACT PERSONAL DATA PRIVACY
☐ Consented to the Processing of Personal Data
Date of Consent:
Consent Expires:

ACCOUNT PERSONAL DATA PRIVACY
☐ Consented to the Processing of Personal Data
Date of Consent:
Consent Expires:

Figure: Import New Customers scenario

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Import New Customers ☒ Active ☐ Make Visible on the UI

* Screen Name: Customers

* Provider: Import/Export Customers

* Provider Object: CustomersMasterFile.csv

Sync Type: Full

Site Map Title:

Workspace:

Category:

Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

INSERT Show All Commands INSERT FROM... SUBSTITUTION LISTS

Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount AcctCD]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Info	Account Name	<input checked="" type="checkbox"/>	CUSTOMER NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer Class	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	Address Line 1	<input checked="" type="checkbox"/>	ADDRESS LINE 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	City	<input checked="" type="checkbox"/>	CITY	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	Country	<input checked="" type="checkbox"/>	COUNTRY	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	State	<input checked="" type="checkbox"/>	STATE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Primary Contact	First Name	<input checked="" type="checkbox"/>	FIRST NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Primary Contact	Last Name	<input checked="" type="checkbox"/>	LAST NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Additional Account Info	Email	<input checked="" type="checkbox"/>	EMAIL	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Additional Account Info	Phone 1	<input type="checkbox"/>	PHONE 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Prepared records on the Import by Scenario form

Import by Scenario

NOTES: The operation has completed.

Name: Import New Customers Number of Records: 34
Screen Name: Customers
Status: Prepared
☐ Simple Scenario
☐ Parallel Processing
☒ Break on Error
☒ Break on Incorrect Target
☐ Discard Previous Result

PREPARED DATA HISTORY DETAILS

	Num	Active	Process	Error	CUSTOMER ID	CUSTOMER NAME	CUSTOMER CLASS	CITY	COUNTRY	STATE	ADDRESS LINE 1	PHONE 1	FIRST NAME	LAST NAME	EMAIL
>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER10	Shortstop Silk Scr...	DEFAULT	Los An...	US		1100 Century Way Thorpe Park	+1 (777) ...	Natal	Kwazulu	Silk-shop@mail.com
	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER11	Elite Answering	DEFAULT	New Y...	US	NY	111 Penn Plz	+1 (777) ...	Leslie	Graff	help@elite-answer.com
	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER12	NPC Call Center	DEFAULT	New Y...	US	NY	116 Pearl St	+1 (777) ...	Thomas	Ehardt	call@npc-call.com
	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER14	ABC Studios Inc, T...	DEFAULT	Jamaica	US	NY	119 Guy R Brewer Blvd, 119 Guy R Br...	+1 (777) ...	Joahn	Livier	vhll@acumatica.com
	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER15	Midwood Ambulance	DEFAULT	Rueil ...	FR		12/14 Rue Henri Sainte Claire deville	+1 (777) ...	Jeroen	Lind	balaa@midwood.com
	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER16	New York Public Li...	DEFAULT	Los An...	US	CA	120 Pico	+1 (777) ...	Rik	Broekman	info@nyppa.com
	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER18	Real Estate Institute	DEFAULT	Fort d...	FR		1216 Rue Lamartine	+1 (777) ...	Joao	Pereira	www.estate-institute.com
	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER19	USA Bartending S...	DEFAULT	New Y...	US	NY	122 E 42ND St Ste 320	+1 (777) ...	Kurt	Meire	vhll acumatica@gmail.com
	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER21	Star America Pres...	DEFAULT	any city	US		123 any street	+1 (212) ...	Kenneth	Ocklund	staramerica@mail.com
	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER22	Huntington Nation...	DEFAULT	any city	US		123 any street	+1 (777) ...	Anders	Wikholm	info@huntington.com
	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER29	Uniforce Staffing S...	DEFAULT	New Y...	US	NY	140 West St	+1 (777) ...	Jerome	Bouat	uniforce@nymail.com
	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER30	Upwardmobility	DEFAULT	Flushing	US	NY	140-15 Holly Ave	+1 (777) ...	Stephane	Sans	ssans@upwardmobility.com
	13	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER31	Naaap Associates	DEFAULT	New Y...	US	NY	1410 Broadway	+1 (777) ...	Riaan	Nagel	mail@Naaap.com
	14	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER33	USA- NY Models A...	DEFAULT	New Y...	US	NY	150 5th Ave	+1 (777) ...	Umesh	Shewate	ny@usamodels.com
	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER34	Westwood Manor	DEFAULT	New Y...	US	NY	152 W 52nd St	+1 (777) ...	Yiannis	Chourdakis	westwood-manor@nymail...
	16	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER40	Texas Video City	DEFAULT	New Y...	US	NY	1674 Broadway	+1 (777) ...	Ken	Nikl	texas@video-city.com
	17	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER41	Borders Books, M...	DEFAULT	Singa...	SG		17 Temasek Blvd	+1 (777) ...	Joseph	Clapton	border@usamail.com

Lesson Summary

In this lesson, you have learned how to import new master records into Acumatica ERP by using import scenarios. To import new records, you have done the following:

1. Created a data provider for the source data (done in Part 1 of the course)
2. Reviewed the sequence of actions to be performed on the applicable Acumatica ERP form if you were entering the record manually
3. Created an import scenario that uses the data provider and reproduces the sequence of actions performed on the form in the scenario mapping
4. Imported data records by using the created scenario

After the records were imported, you verified the results by using one of the methods described in “Recommendations for Data Verification”.

To create the mapping for the import scenario, you have done the following:

- Mapped the key field first
- Specified the mapping steps in the order in which the corresponding fields and actions were manually entered on the form
- Added the <Action: Save> step to the mapping to save the changes that you made through the scenario

Lesson 2.2: Updating Records by Using IDs

Learning Objectives

In this lesson, you will learn how to do the following:

- Create an import scenario for data update
- Handle dialog box answers in import scenarios
- Update records by using an import scenario
- Select the data synchronization type

Figure: Prepared records on the Import by Scenario form

Import by Scenario

NOTES: The operation has completed.

PREPARED DATA HISTORY DETAILS

Number of Records: 34

Break on Error
Break on Incorrect Target
Discard Previous Result

Num	Active	Process	Error	CUSTOMER ID	CUSTOMER NAME	CUSTOMER CLASS	CITY	COUNTRY	STATE	ADDRESS LINE 1	PHONE 1	FIRST NAME	LAST NAME	EMAIL
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER10	Shortstop Silk Scr...	DEFAULT	Los An...	US		1100 Century Way Thorpe Park	+1 (777) ...	Natal	Kwazulu	Silk-shop@mail.com
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER11	Elite Answering	DEFAULT	New Y...	US	NY	111 Penn Plz	+1 (777) ...	Leslie	Graff	help@elite-answer.com
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER12	NPC Call Center	DEFAULT	New Y...	US	NY	116 Pearl St	+1 (777) ...	Thomas	Ehardt	call@npc-call.com
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER14	ABC Studios Inc, T...	DEFAULT	Jamaica	US	NY	119 Guy R Brewer Blvd, 119 Guy R Br...	+1 (777) ...	Joahn	Livier	vhll@acumatica.com
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER15	Midwood Ambulance	DEFAULT	Rueil ...	FR		12/14 Rue Henri Sainte Claire deville	+1 (777) ...	Jeroen	Lind	balaa@midwood.com
6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER16	New York Public Li...	DEFAULT	Los An...	US	CA	120 Pico	+1 (777) ...	Rik	Broekman	info@nyppa.com
7	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER18	Real Estate Institute	DEFAULT	Fort d...	FR		1216 Rue Lamartine	+1 (777) ...	Joao	Pereira	www.estate-institute.com
8	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER19	USA Bartending S...	DEFAULT	New Y...	US	NY	122 E 42ND St Ste 320	+1 (777) ...	Kurt	Meire	vhll acumatica@gmail.com
9	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER21	Star America Pres...	DEFAULT	any city	US		123 any street	+1 (212) ...	Kenneth	Ocklund	staramerica@mail.com
10	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER22	Huntington Nation...	DEFAULT	any city	US		123 any street	+1 (777) ...	Anders	Wikholm	info@huntington.com
11	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER29	Uniforce Staffing S...	DEFAULT	New Y...	US	NY	140 West St	+1 (777) ...	Jerome	Bouat	uniforce@nymail.com
12	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER30	Upwardmobility	DEFAULT	Flushing	US	NY	140-15 Holly Ave	+1 (777) ...	Stephane	Sans	ssans@upwardmobility.com
13	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER31	Naaap Associates	DEFAULT	New Y...	US	NY	1410 Broadway	+1 (777) ...	Riaan	Nagel	mail@Naaap.com
14	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER33	USA- NY Models A...	DEFAULT	New Y...	US	NY	150 5th Ave	+1 (777) ...	Umesh	Shewate	ny@usamodels.com
15	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER34	Westwood Manor	DEFAULT	New Y...	US	NY	152 W 52nd St	+1 (777) ...	Yiannis	Chourdakis	westwood-manor@nymail...
16	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER40	Texas Video City	DEFAULT	New Y...	US	NY	1674 Broadway	+1 (777) ...	Ken	Niki	texas@video-city.com
17	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER41	Borders Books, M...	DEFAULT	Singa...	SG		17 Temasek Blvd	+1 (777) ...	Joseph	Clapton	border@usamail.com

Figure: The final scenario mapping

Import Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Update Customers ⌵ ☒ Active ☐ Make Visible on the UI ☐ Parallel Processing

* Screen Name: Customers ⌵ Site Map Title: ☒ Break on Error

* Provider: Import/Export Customers ⌵ Workspace: ☒ Break on Incorrect Target

* Provider Object: CustomersMasterFile.csv ⌵ Category: ☐ Discard Previous Result

Sync Type: Full Format Locale: ⌵

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

⌵ + X INSERT Show All Commands ▾ ⬆ ⬇ INSERT FROM... SUBSTITUTION LISTS ⌵

⌵	⌵	Active	*Target Object	*Field / Action Name	Commit	Source Field / Value	Ignore Error
⌵	⌵	<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Customer Summary	<Dialog Answer>	<input checked="" type="checkbox"/>	=Yes	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Customer Summary	Customer Class	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
>	⌵	<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: The CUSTOMER18 customer account with the INTL customer class

Customers
CUSTOMER18 - Real Estate Institute

NOTES FILES CUSTOMIZATION TOOLS ▾

← ↻ 📄 ↶ + 🗑️ 📄 ▾ ⌂ < > >| VIEW ACCOUNT ...

* Customer ID: CUSTOMER18 - Real Estate Institute 🔍 Balance: 0.00
* Customer Status: Active ▾ Prepayment Balance: 0.00
* Customer Class: INTL - International Customers 🔍 ✎

🔔 GENERAL FINANCIAL BILLING SHIPPING PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES ▾

ACCOUNT INFO

* Account Name: Real Estate Institute

ACCOUNT ADDRESS

VIEW ON MAP

Address Line 1: 1216 Rue Lamartine
Address Line 2:
City: Fort de France
State: 🔍
Postal Code:
* Country: FR - France 🔍

ADDITIONAL ACCOUNT INFO

Business 1 ▾ +1 (777) 967-7508
Business 2 ▾
Fax ▾
Account Email: joao@estate-institute.com ✉
Web: ✎
Ext Ref Nbr:

PRIMARY CONTACT

Name: Pereira, Joao 🔍 ✎
Job Title:
Email: ✉
Business 1 ▾
Cell ▾

CONTACT PERSONAL DATA PRIVACY

🔔 ☐ Consented to the Processing of Personal Data
Date of Consent: ▾
Consent Expires: ▾

ACCOUNT PERSONAL DATA PRIVACY

🔔 ☐ Consented to the Processing of Personal Data
Date of Consent: ▾
Consent Expires: ▾

Figure: Successful completion of the preparation process

Import by Scenario

NOTES: The operation has completed.

* Name: Update Customers Number of Records: 34 ☒ Break on Error
Screen Name: Customers ☐ Simple Scenario ☒ Break on Incorrect Target
Status: Prepared ☐ Parallel Processing ☐ Discard Previous Result

PREPARED DATA HISTORY DETAILS

REPLACE ADD SUBSTITUTION TOGGLE ACTIVATION CLEAR ACTIVATION UNTIL ERROR TOGGLE PROCESSING CLEAR ERRORS All Records

	Num	Active	Proces	Error	CUSTOMER ID	CUSTOMER NAME	CUSTOMER CLASS	CITY	COUNTRY	STATE	ADDRESS LINE 1	PHONE 1	FIRST NAME	LAST NAME	EMAIL
>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER10	Shortstop Silk Scr...	DEFAULT	Los An...	US		1100 Century Way ...	+1 (777) ...	Natal	Kwazulu	Silk-shop@mail.com
	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER11	Elite Answering	DEFAULT	New Y...	US	NY	111 Penn Plz	+1 (777) ...	Leslie	Graff	help@elite-answer.com
	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER12	NPC Call Center	DEFAULT	New Y...	US	NY	116 Pearl St	+1 (777) ...	Thomas	Ehardt	call@npc-call.com
	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER14	ABC Studios Inc, T...	DEFAULT	Jamaica	US	NY	119 Guy R Brewer ...	+1 (777) ...	Joahn	Lvier	vhll@acumatica.com
	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER15	Midwood Ambulance	INTL	Rueil ...	FR		12/14 Rue Henri S...	+1 (777) ...	Jeroen	Lind	balaa@midwood.com
	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER16	New York Public Li...	DEFAULT	Los An...	US	CA	120 Pico	+1 (777) ...	Rik	Broekman	info@nyplpa.com
	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER18	Real Estate Institute	INTL	Fort d...	FR		1216 Rue Lamartine	+1 (777) ...	Joao	Pereira	joao@estate-institute.com
	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER19	USA Bartending S...	DEFAULT	New Y...	US	NY	122 E 42ND St Ste...	+1 (777) ...	Kurt	Meire	vhll.acumatica@gmail...
	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER21	Star America Pres...	DEFAULT	any city	US		123 any street	+1 (212) ...	Kenneth	Ocklund	staramerica@mail.com
	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER22	Huntington Nation...	DEFAULT	any city	US		123 any street	+1 (777) ...	Anders	Wikhholm	info@huntington.com
	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER29	Uniforce Staffing S...	DEFAULT	New Y...	US	NY	140 West St	+1 (777) ...	Jerome	Bouat	uniforce@nymail.com
	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER30	Upwardmobility	DEFAULT	Flushing	US	NY	140-15 Holly Ave	+1 (777) ...	Stephane	Sans	ssans@upwardmobility...
	13	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER31	Naaap Associates	DEFAULT	New Y...	US	NY	1410 Broadway	+1 (777) ...	Riaan	Nagel	mail@Naaap.com
	14	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER33	USA- NY Models A...	DEFAULT	New Y...	US	NY	150 5th Ave	+1 (777) ...	Umesh	Shewate	ny@usamodels.com
	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER34	Westwood Manor	DEFAULT	New Y...	US	NY	152 W 52nd St	+1 (777) ...	Yiannis	Chourdakis	westwood-manor@ny...
	16	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER40	Texas Video City	DEFAULT	New Y...	US	NY	1674 Broadway	+1 (777) ...	Ken	Niki	texas@video-city.com
	17	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER41	Borders Books, M...	INTL	Singa...	SG		17 Temasek Blvd	+1 (777) ...	Joseph	Clapton	border@usamail.com

Figure: Changed Sync Type in Update Customers scenario

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

📁 ↶ + 🗑️ 📄 ⏪ ⏩ > >| VIEW SCREEN

* Name: Update Customers 🔍

* Screen Name: Customers 🔍

* Provider: Import/Export Customers 🔍

* Provider Object: CustomersMasterFile.csv 🔍

Sync Type: **Incremental - New Only** ▾

☒ Active ☐ Make Visible on the UI

Site Map Title: _____

Workspace: _____

Category: _____

Format Locale: _____ 🔍

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

🔄 + ✕ INSERT Show All Commands ▾ ⬆ ⬇ INSERT FROM... SUBSTITUTION LISTS |⇄|

🔍	📄	🗑️	Active	* Target Object	* Field / Action Name	Commit	Source Field / Value	Ignore Error
>	🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	= [BAccount.AcctCD]	<input type="checkbox"/>
	🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
	🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
	🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	<Dialog Answer>	<input checked="" type="checkbox"/>	= 'Yes'	<input type="checkbox"/>
	🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	Customer Class	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
	🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Failed preparation process

Import by Scenario

NOTES All revisions of this file have been processed.

PREPARE IMPORT ...

* Name: Update Customers Number of Records: 34 ☒ Break on Error
 Screen Name: Customers ☐ Simple Scenario ☒ Break on Incorrect Target
 Status: Prepared ☐ Parallel Processing ☐ Discard Previous Result

PREPARED DATA HISTORY DETAILS

	Num	Active	Proce	Error	CUSTOMER ID	CUSTOMER NAME	CUSTOMER CLASS	CITY	COUNTRY	STATE	ADDRESS LINE 1	PHONE 1	FIRST NAME	LAST NAME	EMAIL
>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER10	Shortstop Silk Scr...	DEFAULT	Los A...	US		1100 Century Way...	+1 (777) ...	Natal	Kwazulu	Silk-shop@mail.com
	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER11	Elite Answering	DEFAULT	New Y...	US	NY	111 Penn Plz	+1 (777) ...	Leslie	Graff	help@elite-answer.com
	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER12	NPC Call Center	DEFAULT	New Y...	US	NY	116 Pearl St	+1 (777) ...	Thomas	Ehardt	call@npc-call.com
	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER14	ABC Studios Inc. ...	DEFAULT	Jamaica	US	NY	119 Guy R Brewer...	+1 (777) ...	Joahn	Livier	vhill@acumatica.com
	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER15	Midwood Ambulance	INTL	Rueil ...	FR		12/14 Rue Henri S...	+1 (777) ...	Jeroen	Lind	balaa@midwood.com
	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER16	New York Public Li...	DEFAULT	Los A...	US	CA	120 Pico	+1 (777) ...	Rik	Broekman	info@nyplpa.com
	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER18	Real Estate Institute	INTL	Fort d...	FR		1216 Rue Lamartine	+1 (777) ...	Joao	Pereira	joao@estate-institute.com
	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER19	USA Bartending S...	DEFAULT	New Y...	US	NY	122 E 42ND St St...	+1 (777) ...	Kurt	Meire	vhill.acumatica@gmail.com
	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER21	Star America Pres...	DEFAULT	any city	US		123 any street	+1 (212) ...	Kenneth	Ocklund	staramerica@mail.com
	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER22	Huntington Nation...	DEFAULT	any city	US		123 any street	+1 (777) ...	Anders	Wikholm	info@huntington.com
	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER29	Uniforce Staffing ...	DEFAULT	New Y...	US	NY	140 West St	+1 (777) ...	Jerome	Bouat	uniforce@nymail.com
	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER30	Upwardmobility	DEFAULT	Flushing	US	NY	140-15 Holly Ave	+1 (777) ...	Stephane	Sans	ssans@upwardmobility.c...
	13	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER31	Naaap Associates	DEFAULT	New Y...	US	NY	1410 Broadway	+1 (777) ...	Riaan	Nagel	mail@Naaap.com
	14	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER33	USA- NY Models ...	DEFAULT	New Y...	US	NY	150 5th Ave	+1 (777) ...	Umesh	Shewate	ny@usamodels.com
	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER34	Westwood Manor	DEFAULT	New Y...	US	NY	152 W 52nd St	+1 (777) ...	Yiannis	Chourdakis	westwood-manor@nyma...
	16	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER40	Texas Video City	DEFAULT	New Y...	US	NY	1674 Broadway	+1 (777) ...	Ken	Niki	texas@video-city.com

Lesson Summary

In this lesson, you have learned how to create an import scenario for data update and how to use this scenario to update previously imported records.

When a user updates some fields on some forms, a dialog box might be displayed with a confirmation request. In a scenario for such a form, you have to use the command in the scenario mapping to answer the question in the dialog box. In the mapping, the command should be inserted before the field whose change causes the dialog box to appear, as was shown in this lesson.

You can insert the command after the field whose change causes the dialog box to appear only if the Commit check box is cleared for this field.

You have also learned how to use data synchronization options when importing data from file data sources. On the Import Scenarios (SM206025) form, you can set the SyncType box of the import scenario to Incremental - New Only or Incremental - All Records (instead of the default setting, Full). Both of these options make the system execute the import scenario only if a new version of the file is uploaded; if no new file is provided, the import will not be run.

Lesson 2.3: Deleting Incorrectly Imported Records

Learning Objectives

In this lesson, you will learn how to do the following:

- Delete records by using an import scenario
- Apply restrictions on the source and target fields in the import scenario

Figure: Delete Customers (Target Restrictions) scenario

Import Scenarios NOTES FILES (1) CUSTOMIZATION TOOLS ▾

📄 ↺ + 🗑️ 🔄 ⌂ ⏪ ⏩ VIEW SCREEN

• Name: Delete Customers (Target Restrictions) 🔍

• Screen Name: Customers 🔍

• Provider: Import/Export Customers 🔍

• Provider Object: CustomersMasterFile.csv 🔍

Sync Type: Full ▾

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale: 🔍

☐ Parallel Processing

☒ Break on Error

☐ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

🔄 + × INSERT Show All Commands ▾ ⬆ ⬇ INSERT FROM... SUBSTITUTION LISTS ⌌

		Active	*Target Object	*Field / Action Name	Commit	Source Field / Value	Ignore Error
🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
🔍	🗑️	<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
>	🗑️	<input checked="" type="checkbox"/>	Customer Summary	<Action: Delete>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Target restrictions

Import Scenarios

📁 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ VIEW SCREEN

* Name:

* Screen Name:

* Provider:

* Provider Object:

Sync Type:

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:


Format Locale:

MAPPING SOURCE RESTRICTIONS **TARGET RESTRICTIONS**


🔄 + × ⏪ ⏩

📄	🔒	📄	Active	Brackets	* Field Name	* Condition	Is Relative	Value	Value 2	Brackets	Operator
>	🔒	📄	<input checked="" type="checkbox"/>	-	Customer Status	Equals	<input type="checkbox"/>	Inactive		-	And


* Name:

Delete Customers (Source Restriction: 


* Screen Name:

Customers 


* Provider:

Import/Export Customers 

* Provider Object:

CustomersMasterFile.csv 

Sync Type:

Full 

☒ Active


☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:



☐ Parallel Processing

☒ Break on Error


☒ Break on Incorrect Target


☐ Discard Previous Result


MAPPING


SOURCE RESTRICTIONS


TARGET RESTRICTIONS
















			Active	Brackets	* Field Name	* Condition	Is Relative	Value	Value 2	Brackets	Operator
>			<input checked="" type="checkbox"/>	-	CUSTOMER ID	Starts With	<input type="checkbox"/>	CUSTOMER		-	And

Figure: The processed records

Import by Scenario

NOTES: The operation has completed. 1

Name: Delete Customers (Target Re... Number of Records: 34 Break on Error
Screen Name: Customers Simple Scenario Break on Incorrect Target
Status: Processed Parallel Processing Discard Previous Result

PREPARED DATA HISTORY DETAILS

REPLACE ADD SUBSTITUTION TOGGLE ACTIVATION CLEAR ACTIVATION UNTIL ERROR TOGGLE PROCESSING CLEAR ERRORS All Records

	Num	Active	Process	Error	CUSTOMER ID	CUSTOMER NAME	CUSTOMER CLASS	CITY	COUNTRY	STATE	ADDRESS LINE 1	PHONE 1	FIRST NAME	LAST NAME	EMAIL
18	18	✓	□	The target found violates the ...	CUSTOMER42	Church of The Apo...	DEFAULT	Liburn	US	GA	17570 Stone Moun...	+1 (972) ...	Joe	Smith	joe.smith@gmail.com
19	19	✓	□	The target found violates the ...	CUSTOMER45	Artrages	DEFAULT	Brooklyn	US	NY	1794 Coney Island ...	+1 (777) ...	Joe	Smith	info@Artrages.com
20	20	✓	□	The target found violates the ...	CUSTOMER46	Sacramento Marina	INTL	Fukuo...	JP		1835, 2-3-10 Sumi...	+1 (777) ...	Cody	Grindstaff	marina@mail.com
21	21	✓	□	The target found violates the ...	CUSTOMER47	Gold River Taxi Ser...	DEFAULT	Levitte...	US	PA	1891 Runway Rd	+1 (777) ...	Cherry	McCabe	taxi@goldriver.com
22	22	✓	□	The target found violates the ...	CUSTOMER49	Shore Mortgage Inc	DEFAULT	New Y...	US	NY	2 Times Sq	+1 (777) ...	Ricardo	Amaya	mortgage@usamail.com
23	23	✓	□	The target found violates the ...	CUSTOMER50	Cash Connection	DEFAULT	New Y...	US	NY	200 W 44th St	+1 (313) ...	Peter	Cook	cash@cc.com
24	24	✓	□	The target found violates the ...	CUSTOMER55	Philly Photography	DEFAULT	New Y...	US	NY	22 E 49th St	+1 (777) ...	Catherine	Gates	philly-photo@good...
25	25	✓	□	The target found violates the ...	CUSTOMER56	O'Neill's Catering	DEFAULT	New Y...	US	NY	221 W 38TH St Ste 2	+1 (777) ...	Yasuichi	Kitamura	oneill@mail.com
26	26	✓	□	The target found violates the ...	CUSTOMER57	Western Star Trucks	DEFAULT	Atlanta	US	GA	22112 Clay Spring ...	+1 (215) ...	Jewell	Hopkins	trucks@mail.com
27	27	✓	□	The target found violates the ...	CUSTOMER60	Veracity Credit Con...	DEFAULT	New Y...	US	NY	226 W 50th St	+1 (777) ...	Tracy	Robinson	consulting@vera-cr...
28	28	✓	□	The target found violates the ...	CUSTOMER61	Office Depot	DEFAULT	New Y...	US	NY	23 W 39th St	+1 (777) ...	James	Hahn	info@office-depot.com
29	29	✓	□	The target found violates the ...	CUSTOMER62	Compuresource, Ltd	DEFAULT	New Y...	US	NY	2317 Madison Ave ...	+1 (777) ...	Dennis	Ramirez	mail@Compuresour...
30	30	✓	□	The target found violates the ...	CUSTOMER72	Cartridge World Inc	INTLCA	Richm...	CA	ON	25-10815 Bathurst St	+49 (991) ...	Mihailo	Simpson	mail@cartridge-wol...
31	31	✓	□	The target found violates the ...	CUSTOMER73	Hiekel Computer S...	DEFAULT	Radnor	US	PA	259 North Radnor...	+49 (991) ...	Sezai	Bayrak	service@heikel...
32	32	✓	□	The target found violates the ...	CUSTOMER82	SF Technical Serv...	DEFAULT	New Y...	US	NY	30 Rockefeller Plz	+44 (01) ...	Gary	Freeman	info@sfts.com
33	33	✓	✓		CUST000001	Qvik Process Ltd	DEFAULT	Las Ve...	US	NV	3204 W Desert Inn ...	+1 (123) ...	Hope	Ritz	sales@qvik.us
34	34	✓	✓		CUST000002	Qvik Process GmbH	INTLEU	Croydon	GB		322 Loway Street	+49 (991) ...	Francisco	Reyes	sales@qvik.de

Figure: The records prepared for import

Import by Scenario ☆

NOTESFILES (1)CUSTOMIZATIONTOOLS

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PREPAREIMPORT...

* Name:Delete Customers (Source Re

Number of Records:32

☒ Break on Error

Screen Name:Customers

☐ Simple Scenario

☒ Break on Incorrect Target

Status:Prepared

☐ Parallel Processing

☐ Discard Previous Result

PREPARED DATAHISTORYDETAILS

⌂+×REPLACEADD SUBSTITUTIONTOGGLE ACTIVATIONCLEAR ACTIVATION UNTIL ERRORTOGGLE PROCESSINGCLEAR ERRORS

⌂

All Records

	Num	Active	Processed	Error	CUSTOMER ID	CUSTOMER NAME	CUSTOMER CLASS	CITY	COUNTRY	STATE	ADDRESS LINE 1	PHONE 1	FIRST NAME	LAST NAME	EMAIL
1	1	<input type="checkbox"/>	<input type="checkbox"/>		CUSTOMER10	Shortstop Silk Screening	DEFAULT	Los An...	US		1100 Century Way ...	+1 (777) 476-6971	Natal	Kwazulu	Silk-shop@mail.com
2	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER11	Elite Answering	DEFAULT	New York	US	NY	111 Penn Plz	+1 (777) 423-6750	Leslie	Graff	help@elite-answer.com
3	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER12	NPC Call Center	DEFAULT	New York	US	NY	116 Pearl St	+1 (777) 879-4144	Thomas	Ehardt	call@npc-call.com
4	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER14	ABC Studios Inc, The	DEFAULT	Jamaica	US	NY	119 Guy R Brewer ...	+1 (777) 446-7537	Joahn	Livier	vhil@acumatica.com
5	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER15	Midwood Ambulance	INTLEU	Rueil ...	FR		12/14 Rue Henri S...	+1 (777) 645-1340	Jeroen	Lind	balaa@midwood.com
6	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER16	New York Public Library for ...	DEFAULT	Los An...	US	CA	120 Pico	+1 (777) 832-1630	Rik	Broekman	info@nyppla.com
7	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER18	Real Estate Institute	INTLEU	Fort de...	FR		1216 Rue Lamartine	+1 (777) 967-7508	Joao	Pereira	joao@estate-institut...
8	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER19	USA Bartending School	DEFAULT	New York	US	NY	122 E 42ND St Ste ...	+1 (777) 532-9522	Kurt	Meire	vhil.acumatica@gm...
9	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER21	Star America Preschool	DEFAULT	any city	US		123 any street	+1 (212) 262-4896	Kenneth	Ocklund	staramerica@gmail.com
10	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER22	Huntington National Learni...	DEFAULT	any city	US		123 any street	+1 (777) 377-7231	Anders	Wikholm	info@huntington.com
11	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER29	Uniforce Staffing Service	DEFAULT	New York	US	NY	140 West St	+1 (777) 933-2772	Jerome	Bouat	uniforce@nymail.com
12	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER30	Upwardmobility	DEFAULT	Flushing	US	NY	140-15 Holly Ave	+1 (777) 429-3692	Stephane	Sans	ssans@upwardmobi...
13	13	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER31	Naaap Associates	DEFAULT	New York	US	NY	1410 Broadway	+1 (777) 345-5547	Riaan	Nagel	mail@Naaap.com
14	14	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER33	USA- NY Models Agency	DEFAULT	New Y...	US	NY	150 5th Ave	+1 (777) 271-4551	Umesh	Shewate	ny@usamodels.com
15	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER34	Westwood Manor	DEFAULT	New York	US	NY	152 W 52nd St	+1 (777) 654-4200	Yiannis	Chourdakis	westwood-manor@...
16	16	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER40	Texas Video City	DEFAULT	New York	US	NY	1674 Broadway	+1 (777) 283-9534	Ken	Niki	texas@video-city.com
17	17	<input checked="" type="checkbox"/>	<input type="checkbox"/>		CUSTOMER41	Borders Books, Music & Cafe	INTL	Singap...	SG		17 Temasek Blvd	+1 (777) 219-0512	Joseph	Clapton	border@usamail.com

Lesson Summary

In this lesson, you have learned how to use import scenarios to delete records with the IDs specified in the source file. To delete records, you have used <Action: Delete> at the end of the scenario mapping.

You have also learned how to specify restrictions for the source and target records in import scenarios on the Source Restrictions and Target Restrictions tabs of the Import Scenarios (SM206025) form. You have used source restrictions to select certain records from the source to be imported. You have used target restrictions to execute the import scenario only for records in the system that satisfy the target restriction conditions of the import scenario.

Day 2

Lesson 2.4: Working with Auto-Numbered Imported Records

Learning Objectives

In this lesson, you will learn how to do the following:

- Import records with automatically generated IDs through an import scenario
- Search for the imported records by a custom key and by a column of the lookup table

Figure: CUSTOMER segmented key

Segmented Keys

📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩

* Segmented Key ID: 1 Max Length: 30
Parent: BIZACCT Length: 10
Lookup Mode: By Segmented Key Segments: 1
☐ Allow Adding New Values On the Fly
Specific Module:
Numbering ID: 2
* Description:

🔄 + ✕ VIEW SEGMENT ⏪ ⏩

	Segment ID	*Description	Override	Length	Align	Edit Mask	Case Conversion	Validate	Auto Number	* Separator
>	1	Business Account	<input checked="" type="checkbox"/>	10	Left	Unicode	Uppercase	<input type="checkbox"/>	<input checked="" type="checkbox"/> 3	-

Figure: Mapping of the scenario

Import Scenarios

NOTES FILES (2) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Import New Customers with Auto-Num
 * Screen Name: Customers
 * Provider: Import/Export Customers
 * Provider Object: CustomersMasterFile.csv
 Sync Type: Full

☒ Active ☐ Make Visible on the UI
 Site Map Title:
 Workspace:
 Category:
 Format Locale:

☐ Parallel Processing
☒ Break on Error
☒ Break on Incorrect Target
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

INSERT Show All Commands INSERT FROM... SUBSTITUTION LISTS





Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Info	Account Name	<input checked="" type="checkbox"/>	CUSTOMER NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer Class	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	Address Line 1	<input checked="" type="checkbox"/>	ADDRESS LINE 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	City	<input checked="" type="checkbox"/>	CITY	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	Country	<input checked="" type="checkbox"/>	COUNTRY	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	State	<input checked="" type="checkbox"/>	STATE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Primary Contact	First Name	<input checked="" type="checkbox"/>	FIRST NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Primary Contact	Last Name	<input checked="" type="checkbox"/>	LAST NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Additional Account Info	Email	<input checked="" type="checkbox"/>	EMAIL	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Additional Account Info	Phone 1	<input type="checkbox"/>	PHONE 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Additional Account Info -> Ext Ref Nbr	Ext Ref Nbr	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>


Figure: The Edit button

Import Scenarios

NOTES FILES (2) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Import New Customers with Formula 
* Screen Name: Customers 
* Provider: Import/Export Customers 
* Provider Object: CustomersMasterFile.csv 
Sync Type: Full ▾

☒ Active ☐ Make Visible on the UI
Site Map Title:
Workspace:
Category:
Format Locale: 

☐ Parallel Processing
☒ Break on Error
☒ Break on Incorrect Target
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

↺ + × INSERT Show All Commands ▾ ↑ ↓ INSERT FROM... SUBSTITUTION LISTS |⇄|















































			Active	*Target Object	*Field / Action Name	Commit	Source Field / Value	Ignore Error
			<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
			<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	CUSTOMER ID 	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Account Info	Account Name	<input checked="" type="checkbox"/>	CUSTOMER NAME	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	Customer Summary	Customer Class	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Account Address	Address Line 1	<input checked="" type="checkbox"/>	ADDRESS LINE 1	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Account Address	City	<input checked="" type="checkbox"/>	CITY	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Account Address	Country	<input checked="" type="checkbox"/>	COUNTRY	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Account Address	State	<input checked="" type="checkbox"/>	STATE	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Primary Contact	First Name	<input checked="" type="checkbox"/>	FIRST NAME	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Primary Contact	Last Name	<input checked="" type="checkbox"/>	LAST NAME	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Additional Account Info	Email	<input checked="" type="checkbox"/>	EMAIL	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	General -> Additional Account Info	Phone 1	<input type="checkbox"/>	PHONE 1	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: The formula for a source field

The screenshot shows a formula editor interface. On the left is a tree view with three main categories: Operators, Functions, and Fields. Under Operators are Arithmetic, Logical, Comparison (highlighted with a blue underline), and Other. Under Functions are Conversion, Text, Math, Date/Time, and Other. Under Fields is Internal. To the right of the tree is a large empty search box with a magnifying glass icon. Below the tree and search box is a text input field containing the formula: `= 'C' + PadLeft(CStr(130+LineNbr()), 9, '0')`. The text `CStr(130+LineNbr())` is underlined in red. At the bottom of the window, there is a status bar that says "Validation passed." and three buttons: VALIDATE, OK, and CANCEL.

Figure: The formula for a source field

Import Scenarios NOTES FILES (1) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Import New Customers with Formula

* Screen Name: Customers

* Provider: Import/Export Customers

* Provider Object: CustomersMasterFile.csv

Sync Type: Full

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

INSERT Show All Commands

Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	= 'C' + PadLeft(CStr(130+LineNbr()), 9, '0')	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Info	Account Name	<input checked="" type="checkbox"/>	CUSTOMER NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer Class	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	Address Line 1	<input checked="" type="checkbox"/>	ADDRESS LINE 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	City	<input checked="" type="checkbox"/>	CITY	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	Country	<input checked="" type="checkbox"/>	COUNTRY	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Account Address	State	<input checked="" type="checkbox"/>	STATE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Primary Contact	First Name	<input checked="" type="checkbox"/>	FIRST NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Primary Contact	Last Name	<input checked="" type="checkbox"/>	LAST NAME	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Additional Account Info	Email	<input checked="" type="checkbox"/>	EMAIL	<input type="checkbox"/>
<input checked="" type="checkbox"/>	General -> Additional Account Info	Phone 1	<input type="checkbox"/>	PHONE 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Column Configuration dialog box

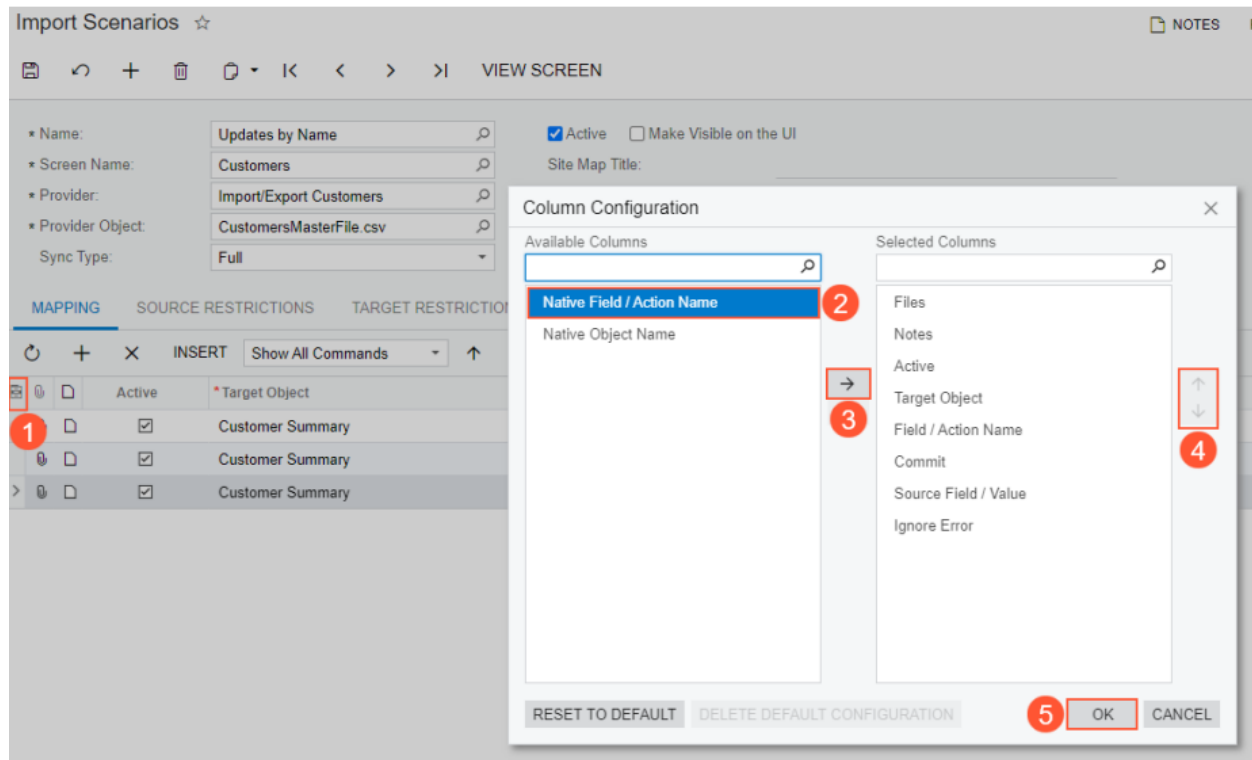


Figure: The final scenario mapping

Import Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Update Customers by Name ☒ Active ☐ Make Visible on the UI

* Screen Name: Customers Site Map Title:

* Provider: Import/Export Customers Workspace:

* Provider Object: CustomersMasterFile.csv Category:

Sync Type: Full Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

⌂ + × INSERT Show All Commands ↑ ↓ INSERT FROM... SUBSTITUTION LISTS |

⌂	🔍	📄	Active	*Target Object	*Field / Action Name	Native Field / Action Name	Commit	Source Field / Value	Ignore Error
>	🔍	📄	<input checked="" type="checkbox"/>	Customer Summary	@@AcctCDIacctName	@@AcctCDIacctName	<input type="checkbox"/>	=[CurrentCustomer.AcctName]	<input type="checkbox"/>
	🔍	📄	<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	@@AcctCD	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
	🔍	📄	<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<cancel>	<input type="checkbox"/>		<input type="checkbox"/>
	🔍	📄	<input checked="" type="checkbox"/>	Customer Summary	Customer ID -> Account Name	AcctCDIacctName	<input checked="" type="checkbox"/>	CUSTOMER NAME	<input type="checkbox"/>
	🔍	📄	<input checked="" type="checkbox"/>	Customer Summary	<Dialog Answer>	??	<input checked="" type="checkbox"/>	= 'Yes'	<input type="checkbox"/>
	🔍	📄	<input checked="" type="checkbox"/>	Customer Summary	Customer Class	CustomerClassID	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
	🔍	📄	<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Customer records with the INTL customer class after update

Customers

CUSTOMIZATION

TOOLS

Customer Class: = 'INTL'

Customer Status: All

		Customer ID	Customer Name	Customer Class	Country	City	Currency ID	Terms	Customer Status
>	<div></div>	<div>C000000101</div>	Midwood Ambulance	INTL	FR	Rueil Malmaison	USD	30D7D3	Active
	<div></div>	<div>C000000103</div>	Real Estate Institute	INTL	FR	Fort de France	USD	30D7D3	Active
	<div></div>	<div>C000000113</div>	Borders Books, Music & Cafe	INTL	SG	Singapore	USD	30D7D3	Active
	<div></div>	<div>C000000116</div>	Sacramento Marina	INTL	JP	Fukuoka City	USD	30D7D3	Active
	<div></div>	<div>C000000126</div>	Cartridge World Inc	INTL	CA	Richmond Hill	USD	30D7D3	Active
	<div></div>	<div>C000000130</div>	Qvik Process GmbH	INTL	GB	Croydon	USD	30D7D3	Active

Figure: The final scenario mapping

Import Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

★ Name: Update Customers by Email ☒ Active ☐ Make Visible on the UI

★ Screen Name: Customers

★ Provider: Import/Export Customers

★ Provider Object: CustomersMasterFile.csv

Sync Type: Full

Site Map Title:

Workspace:

Category:

Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result







MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS













⌂ + × INSERT Show All Commands ↕ ⬆ INSERT FROM... SUBSTITUTION LISTS |

⌂	🔍	🔍	Active	*Target Object	*Field / Action Name	Commit	Source Field / Value	Ignore Error
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
>	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	Customer ID -> Email	<input type="checkbox"/>	EMAIL	<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	<Dialog Answer>	<input checked="" type="checkbox"/>	=Yes'	<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	Customer Class	<input checked="" type="checkbox"/>	CUSTOMER CLASS	<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Customer records with the changed classes after update

Customers CUSTOMIZATION ▾ TOOLS ▾

Customer Status: All ▾		Customer Class: Contains 'INTL' ▾							
		Customer ID	Customer Name	Customer Class ▾	Country	City	Currency ID	Terms	Customer Status
>		 C000000101	Midwood Ambulance	INTLEU	FR	Rueil Malmaison	USD	30D	Active
		 C000000103	Real Estate Institute	INTLEU	FR	Fort de France	USD	30D	Active
		 C000000113	Borders Books, Music & Cafe	INTL	SG	Singapore	USD	30D7D3	Active
		 C000000116	Sacramento Marina	INTL	JP	Fukuoka City	USD	30D7D3	Active
		 C000000126	Cartridge World Inc	INTLCA	CA	Richmond Hill	USD	30D	Active
		 C000000130	Qvik Process GmbH	INTLEU	GB	Croydon	USD	30D	Active

Lesson Summary

In this lesson, you have learned how to import customer records with IDs that the system automatically assigns. You have also learned how to mass-update records in the system that are identified by a value other than the ID. If you do not have the IDs of the records in the source, in the import scenario, you can identify the records by unique information that you have, such as the name or email address of the customer. To search for a record, you have to declare a custom key or use a column of the lookup table of the predefined key field.

You have learned that to create a custom key, you have to do the following on the Import Scenarios (SM206025) form:

1. Set the value of the custom key field, and select the Commit check box for it.
2. Directly before the step that sets the value of the custom key field, insert a step with the @@ notation that defines the field as the key.

To search for a record, you have used the fields of the Summary object as custom keys. (You cannot use the fields of other objects as custom keys.)

To use the column of the lookup table for a search, you mapped the column command to the matching external field.

Lesson 2.5: Working with Master-Detail Records

Learning Objectives

In this lesson, you will learn how to do the following:

- Import master-detail records with IDs and automatic numbering
- Update detail lines of the imported records by using import scenarios
- Apply actions to imported records
- Configure an import scenario to import country-specific data correctly • Select items for document lines from a dialog box in import scenarios

Figure: The final scenario mapping

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS

VIEW SCREEN

Name: Import AR Invoices Active ☒ Make Visible on the UI ☐
 Screen Name: Invoices and Memos Site Map Title:

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

INSERT Show All Commands INSERT FROM... SUBSTITUTION LISTS

Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	<input type="checkbox"/>	=[Document.DocType]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	<input type="checkbox"/>	=[Document.RefNbr]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Type	<input checked="" type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input checked="" type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Customer	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Date	<input checked="" type="checkbox"/>	DATE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Post Period	<input checked="" type="checkbox"/>	POST PERIOD	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Status	<input checked="" type="checkbox"/>	=[Document.Status]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Transition>	<input checked="" type="checkbox"/>	=If([Document.Status]='H', 'PutOnHold')	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Customer Order Nbr.	<input type="checkbox"/>	CUSTOMER REF NBR	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Description	<input type="checkbox"/>	DOC DESCRIPTION	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Financial -> Link to GL	Branch	<input checked="" type="checkbox"/>	ORIGINATING BRANCH	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	<Line Number>	<input type="checkbox"/>	=-1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Branch	<input checked="" type="checkbox"/>	DESTINATION BRANCH	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Transaction Descr.	<input type="checkbox"/>	LINE DESCRIPTION	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Ext. Price	<input checked="" type="checkbox"/>	EXT PRICE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Account	<input checked="" type="checkbox"/>	ACCOUNT	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Subaccount	<input checked="" type="checkbox"/>	SUBACCOUNT	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Amount	<input checked="" type="checkbox"/>	TOTAL AMOUNT	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Remove Hold> (ReleaseFromHold...	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

NOTES  The operation has completed. 

Figure: The final scenario mapping

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ VIEW SCREEN

* Name: ☒ Active ☐ Make Visible on the UI

* Screen Name: Site Map Title:

* Provider: Workspace:

* Provider Object: Category:

Sync Type: Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

🔄 + ✕ INSERT Show All Commands ⬆️ ⬇️ INSERT FROM... SUBSTITUTION LISTS ⌂

📄	📄	Active	* Target Object	* Field / Action Name	Commit	Source Field / Value	Ignore Error
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	<input type="checkbox"/>	=[Document.DocType]	<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	<input type="checkbox"/>	=[Document.RefNbr]	<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	Type	<input checked="" type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input checked="" type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	Amount	<input checked="" type="checkbox"/>	TOTAL AMOUNT	<input checked="" type="checkbox"/>
>	📄	<input checked="" type="checkbox"/>	Details	<Line Number>	<input type="checkbox"/>	LINE NBR	<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Details	Ext. Price	<input checked="" type="checkbox"/>	EXT PRICE	<input type="checkbox"/>
📄	📄	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: The final scenario mapping

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Update AR Invoices by Line Descriptio
 * Screen Name: Invoices and Memos
 * Provider: Import/Export AR Invoices
 * Provider Object: AR Invoices
 Sync Type: Full

☒ Active ☐ Make Visible on the UI
 Site Map Title:
 Workspace:
 Category:
 Format Locale:

☐ Parallel Processing
☒ Break on Error
☒ Break on Incorrect Target
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

INSERT Show All Commands INSERT FROM... SUBSTITUTION LISTS

Active	Target Object	Field / Action Name	Native Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	@@DocType	<input type="checkbox"/>	= [Document.DocType]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	@@RefNbr	<input type="checkbox"/>	= [Document.RefNbr]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Type	DocType	<input checked="" type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	RefNbr	<input checked="" type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Amount	CuryOrigDocAmt	<input checked="" type="checkbox"/>	TOTALAMOUNT	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Details	@@TranDesc	@@TranDesc	<input type="checkbox"/>	= [Transactions.TranDesc]	<input type="checkbox"/>
<input type="checkbox"/>	Details	<Line Number>	##	<input type="checkbox"/>	= -1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Transaction Descr.	TranDesc	<input checked="" type="checkbox"/>	LINE DESCRIPTION	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Ext. Price	CuryExtPrice	<input checked="" type="checkbox"/>	EXT PRICE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Save>	<Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: The final scenario mapping

Import Scenarios

Release AR Invoices

NOTES FILES (2) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Release AR Invoices

* Screen Name: Invoices and Memos

* Provider: Import/Export AR Invoices

* Provider Object: AR Invoices

Sync Type: Full

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

Active X INSERT Show All Commands INSERT FROM... SUBSTITUTION LISTS

	Active	*Target Object	*Field / Action Name	Commit	Source Field / Value	Ignore Error
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	<input type="checkbox"/>	= [Document.DocType]	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	<input type="checkbox"/>	= [Document.RefNbr]	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	Type	<input checked="" type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input checked="" type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	Description	<input type="checkbox"/>	= [DOC DESCRIPTION]+RELEASED	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Release> (Release)	<input checked="" type="checkbox"/>		<input type="checkbox"/>

Figure: Source restriction

Import Scenarios

Release AR Invoices

NOTES FILES (2) CUSTOMIZATION TOOLS ▾

← ↻ ⌂ ↶ + 🗑️ 📄 ⌂ < > >| VIEW SCREEN

* Name:	Release AR Invoices 🔍	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Make Visible on the UI	<input type="checkbox"/> Parallel Processing
* Screen Name:	Invoices and Memos 🔍	Site Map Title:	<input checked="" type="checkbox"/> Break on Error
* Provider:	Import/Export AR Invoices 🔍	Workspace:	<input checked="" type="checkbox"/> Break on Incorrect Target
* Provider Object:	AR Invoices 🔍	Category:	<input type="checkbox"/> Discard Previous Result
Sync Type:	Full ▾	Format Locale:	

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

↻ + × ⌂ 🗑️

🗑️	📄	Active	Brackets	* Field Name	* Condit	Is Relative	Value	Value 2	Brackets	Operator
>	🗑️	📄	<input checked="" type="checkbox"/>	-	LINE NBR	Equals	<input type="checkbox"/>	0	-	And

* Inventory ID:
 Product Workgroup:

Item Status:
 Product Manager:

Description:

GENERAL PRICE/COST WAREHOUSES VENDORS ATTRIBUTES PACKAGING CROSS-REFERENCE

Alternate Type	* Vendor/Customer	* Alternate ID	UOM	Description
> Vendor Part Number	V000000014	LEGO500PS		

Figure: Import Purchase Orders from Excel data provider

Data Providers

NOTES FILES (1) CUSTOMIZATION TOOLS

GET FILE LINK

* Name: Import Purchase Orders from
* Provider Type: Excel Provider
☒ Active

PARAMETERS SCHEMA

Source Objects

FILL SCHEMA OBJECTS

Object	Command
POExt	

Source Fields

FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION

Field	Key	Description	Data Type	Data Length	Command
Type		Type	String	-1	
VendorID		VendorID	String	-1	
Date		Date	String	-1	
DocumentReference		DocumentReference	String	-1	
Warehouse		Warehouse	String	-1	
VendorInventoryID		VendorInventoryID	String	-1	
Quantity		Quantity	String	-1	

Figure: Import Purchase Orders scenario

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Import Purchase Orders
 * Screen Name: Purchase Orders
 * Provider: Import Purchase Orders from Excel
 * Provider Object: POExt
 Sync Type: Full

☒ Active ☐ Make Visible on the UI
 Site Map Title:
 Workspace:
 Category:
 Format Locale:

☐ Parallel Processing
☒ Break on Error
☒ Break on Incorrect Target
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

+ X INSERT Show All Commands INSERT FROM... SUBSTITUTION LISTS

Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Document Summary	<Parameter: POOrder.orderType>	<input type="checkbox"/>	= [Document.OrderType]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	<Key: OrderType>	<input type="checkbox"/>	= [Document.OrderType]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	<Key: OrderNbr>	<input type="checkbox"/>	= [Document.OrderNbr]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	Type	<input checked="" type="checkbox"/>	Type	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	Order Nbr.	<input checked="" type="checkbox"/>	DocumentReference	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	Vendor	<input checked="" type="checkbox"/>	VendorID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	Date	<input checked="" type="checkbox"/>	Date	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	Vendor Ref.	<input checked="" type="checkbox"/>	DocumentReference	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	<Line Number>	<input type="checkbox"/>	= -1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Inventory ID	<input checked="" type="checkbox"/>	VendorInventoryID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Warehouse	<input checked="" type="checkbox"/>	Warehouse	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Order Qty.	<input checked="" type="checkbox"/>	Quantity	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Document Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Update Purchase Orders scenario

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

• Name: Update Purchase Orders

• Screen Name: Purchase Orders

• Provider: Import Purchase Orders from Excel

• Provider Object: POExt

Sync Type: Full

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

⌂ + × INSERT Show All Commands ↕ INSERT FROM... SUBSTITUTION LISTS

⌂	🔍	Active	*Target Object	*Field / Action Name	Commit	Source Field / Value	Ignore Error
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	<Parameter: POOrder.orderType>	<input type="checkbox"/>	= [Document.OrderType]	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	<Key: OrderType>	<input type="checkbox"/>	= [Document.OrderType]	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	<Key: OrderNbr>	<input type="checkbox"/>	= [Document.OrderNbr]	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	Type	<input checked="" type="checkbox"/>	Type	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	Order Nbr. -> Vendor Ref.	<input checked="" type="checkbox"/>	DocumentReference	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Details	@InventoryID	<input checked="" type="checkbox"/>	= [Transactions.InventoryID]	<input type="checkbox"/>
>	🔍	<input type="checkbox"/>	Details	<Line Number>	<input type="checkbox"/>	= -1	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Details	Inventory ID	<input checked="" type="checkbox"/>	VendorInventoryID	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Details	Order Qty.	<input checked="" type="checkbox"/>	Quantity	<input type="checkbox"/>
🔍	🔍	<input checked="" type="checkbox"/>	Document Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: The Import AR Invoices Without Duplicates scenario

Import Scenarios

NOTES FILES (3) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Import AR Invoices Without Duplicates ☒ Active ☐ Make Visible on the UI
 * Screen Name: Invoices and Memos Site Map Title:

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

↺ + × INSERT Show All Commands ↑ ↓ INSERT FROM... SUBSTITUTION LISTS ↔

Active	* Target Object	* Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	<input type="checkbox"/>	= [Document.DocType]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	<input type="checkbox"/>	= [Document.RefNbr]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Type	<input checked="" type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr. -> Customer Order Nbr.	<input checked="" type="checkbox"/>	CUSTOMER REF NBR	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Customer	<input checked="" type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Date	<input checked="" type="checkbox"/>	DATE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Post Period	<input checked="" type="checkbox"/>	POST PERIOD	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Customer Order Nbr.	<input checked="" type="checkbox"/>	CUSTOMER REF NBR	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Description	<input type="checkbox"/>	DOC DESCRIPTION	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Financial -> Link to GL	Branch	<input checked="" type="checkbox"/>	ORIGINATING BRANCH	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	@@TranDesc	<input type="checkbox"/>	= [Transactions.TranDesc]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	<Line Number>	<input type="checkbox"/>	= -1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Transaction Descr.	<input checked="" type="checkbox"/>	LINE DESCRIPTION	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Branch	<input checked="" type="checkbox"/>	DESTINATION BRANCH	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Ext. Price	<input checked="" type="checkbox"/>	EXT PRICE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Account	<input checked="" type="checkbox"/>	ACCOUNT	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details	Subaccount	<input checked="" type="checkbox"/>	SUBACCOUNT	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Amount	<input checked="" type="checkbox"/>	TOTAL AMOUNT	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Target restrictions

Import Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Import AR Invoices Without Duplicates ⓘ

* Screen Name: Invoices and Memos ⓘ

* Provider: Import/Export AR Invoices ⓘ

* Provider Object: AR Invoices ⓘ

Sync Type: Full ▾

☒ Active ☐ Make Visible on the UI

Site Map Title: _____

Workspace: _____

Category: _____

Format Locale: _____ ⓘ

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS **TARGET RESTRICTIONS**

⏻ + × ⇄ ☒

☒ ⓘ	☐	☑	Active	Brackets	* Field Name	* Condit	Is Relative	Value	Value 2	Brackets	Operator
>	☐	☑		-	Status	Equals	<input type="checkbox"/>	On Hold		-	Or
	☐	☑		-	Status	Equals	<input type="checkbox"/>	Balanced		-	And

Figure: Import Shipments data provider

Data Providers ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

GET FILE LINK

* Name: Import Shipments

* Provider Type: Excel Provider

☒ Active

PARAMETERS SCHEMA

Source Objects

↻ + × FILL SCHEMA OBJECTS ?

Active	Object	Command
<input checked="" type="checkbox"/>	Sheet1	

Source Fields

↻ + × FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION |<| ☒

Active	Field	Key	Description	Data Type	Data Length	Command
<input checked="" type="checkbox"/>	Type	<input type="checkbox"/>	Type	String	-1	
<input checked="" type="checkbox"/>	ShipmentNbr	<input type="checkbox"/>	ShipmentNbr	String	-1	
<input checked="" type="checkbox"/>	CustomerID	<input type="checkbox"/>	CustomerID	String	-1	
<input checked="" type="checkbox"/>	Warehouse	<input type="checkbox"/>	Warehouse	String	-1	
<input checked="" type="checkbox"/>	OrderType	<input type="checkbox"/>	OrderType	String	-1	
<input checked="" type="checkbox"/>	OrderNbr	<input type="checkbox"/>	OrderNbr	String	-1	
<input checked="" type="checkbox"/>	InventoryID	<input type="checkbox"/>	InventoryID	String	-1	

Figure: Import Shipments scenario mapping

Import Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Import Shipments ⌵
 * Screen Name: Shipments ⌵
 * Provider: Import Shipments ⌵
 * Provider Object: Sheet1 ⌵
 Sync Type: Full ▾

☒ Active ☐ Make Visible on the UI
 Site Map Title: _____
 Workspace: _____
 Category: _____
 Format Locale: _____ ⌵

☐ Parallel Processing
☒ Break on Error
☒ Break on Incorrect Target
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

↻ + × INSERT Show All Commands ▾ ↑ ↓ INSERT FROM... SUBSTITUTION LISTS |—|

⌵	⌵	Active	* Target Object	* Field / Action Name	Commit	Source Field / Value	Ignore Error
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	<Key: ShipmentNbr>	<input type="checkbox"/>	=[Document.ShipmentNbr]	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	Shipment Nbr.	<input checked="" type="checkbox"/>	ShipmentNbr	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	Type	<input checked="" type="checkbox"/>	Type	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	Customer	<input checked="" type="checkbox"/>	CustomerID	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	Warehouse ID	<input checked="" type="checkbox"/>	Warehouse	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	<Dialog Answer>	<input checked="" type="checkbox"/>	='OK'	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	<Action: Add Order>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Add Sales Order -> Operation	OrderType	<input checked="" type="checkbox"/>	OrderType	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Add Sales Order -> Operation	OrderNbr	<input checked="" type="checkbox"/>	OrderNbr	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Add Sales Order	@@SOLine__InventoryID	<input type="checkbox"/>	=[soshipmentplan.SOLine__InventoryID]	<input type="checkbox"/>
>	⌵	<input type="checkbox"/>	Add Sales Order	<Line Number>	<input type="checkbox"/>	=-1	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Add Sales Order	Inventory ID	<input checked="" type="checkbox"/>	InventoryID	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Add Sales Order	Selected	<input checked="" type="checkbox"/>	='True'	<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	<Action: AddSO>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
⌵	⌵	<input checked="" type="checkbox"/>	Shipment Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Delete Salespersons data provider

Data Providers ☆

NOTES FILES (1) CUSTOMIZATION

GET FILE LINK

* Name: Delete Salespersons

* Provider Type: Excel Provider

☒ Active

PARAMETERS SCHEMA

Source Objects

⌂ + × FILL SCHEMA OBJECTS ⇨

⌂	🔍	📄	Active	* Object	Command
>	🔍	📄	<input checked="" type="checkbox"/>	Data	

Source Fields

⌂ + × FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION |←| ☒

⌂	🔍	📄	Active	Field	Key	Description	Data Type	Data Length	Command
>	🔍	📄	<input checked="" type="checkbox"/>	Customer ID	<input type="checkbox"/>	Customer ID	String	-1	
	🔍	📄	<input checked="" type="checkbox"/>	Salesperson ID	<input type="checkbox"/>	Salesperson ID	String	-1	

Figure: The Salespersons tab of the Customers form

Customers

C000000092 - Value Bartending

NOTES FILES CUSTOMIZATION TOOLS ▾

← ↻ ⏮ + 🗑️ 📄 < > >| VIEW ACCOUNT ...

* Customer ID: C000000092 - Value Bartending 🔍 Balance: 0.00

* Customer Status: Active Prepayment Balance: 0.00

* Customer Class: DEFAULT - Default 🔍 ✎

GENERAL FINANCIAL BILLING SHIPPING PAYMENT METHODS CONTACTS **SALESPERSONS** ATTRIBUTES >>

🔄 + × |↔️ ☒

🔍	Salesperson ID	Name	Commission %	Default
	SP0001	Jason Mendenhall	1.000000	<input checked="" type="checkbox"/>
>	SP0002	Michal Bujacek	0.500000	<input type="checkbox"/>
	SP0003	Steve Church	0.500000	<input type="checkbox"/>
	SP0005	Eric Killian	0.500000	<input type="checkbox"/>

Figure: The Delete Salespersons scenario

Import Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Delete Salespersons

* Screen Name: Customers

* Provider: Delete Salespersons

* Provider Object: Data

Sync Type: Full

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:

☐ Parallel Processing

☒ Break on Error

☒ Break on Incorrect Target

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

⌂ + × INSERT Show All Commands ⬆ ⬇ INSERT FROM... SUBSTITUTION LISTS

⌂	🔍	🔍	Active	* Target Object	* Field / Action Name	Commit	Source Field / Value	Ignore Error
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	Customer ID	<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Salespersons	<Key: SalesPersonID>	<input type="checkbox"/>	=[SalesPersons.SalesPersonID]	<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Salespersons	Salesperson ID	<input checked="" type="checkbox"/>	Salesperson ID	<input type="checkbox"/>
⌂	🔍	🔍	<input checked="" type="checkbox"/>	Salespersons	<Line Number>	<input checked="" type="checkbox"/>	=-2	<input type="checkbox"/>
>	⌂	🔍	<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Lesson Summary

In this lesson, you have learned how to import, update, and apply actions to master-detail records, such as documents, by using import scenarios. You have learned that when you are configuring the mapping for a scenario that works with master-detail records by using the Mapping tab of the Import Scenarios (SM206025) form, you should heed the following considerations:

- You have to map the key fields first.
- You should map the key fields to external fields or formulas so that the system can distinguish detail records that belong to different documents.
- You should specify the commands in the order they are performed during manual entry.
- You can modify service commands in order to change the default behavior of the system.
- To update detail lines correctly, you should specify the line number of the detail or search for the needed detail by using the unique value of a detail table column.
- To apply an action to imported records, you should use the command for this action instead of the <Action:Save> command at the end of the scenario.
- To select a detail line from a dialog box, you should do the following:
 - a. Insert the dialog answer command before the action that opens the panel on the Mapping tab of the Import Scenarios form. (The Commit check box is selected automatically.)
 - b. Open the dialog box by using the action command that opens it on the form. (The Commit check box is selected automatically.)
 - c. Select the necessary detail lines and close the dialog box by using the action command used to close it. (The Commit check box should be selected for all fields of the dialog box and for the action that closes the dialog box.)
- To delete a detail line, you insert the <Line Number>=-2 command after the row that specifies the detail line, and select the Commit check box for the command.

You have also learned how to import dates and other country-specific data correctly by using the Format Locale setting of the import scenario, which is specified in the Summary area of the Import Scenarios form.

Day 3

Lesson 2.6: Importing Records with Attributes

Learning Objectives

In this lesson, you will learn how to do the following:

- Import records with attributes.

Figure: Import Leads with Attributes data provider

Data Providers

NOTES FILES (1) CUSTOMIZATION TOOLS

GET FILE LINK

Name: Import Leads with Attributes
Provider Type: Excel Provider
☒ Active

PARAMETERS SCHEMA

Source Objects

Active	Object	Command
<input checked="" type="checkbox"/>	Leads	

Source Fields

Active	Field	Key	Description	Data Type	Data Length	Command
<input checked="" type="checkbox"/>	Name	<input type="checkbox"/>	Name	String	-1	
<input checked="" type="checkbox"/>	Company Name	<input type="checkbox"/>	Company Name	String	-1	
<input checked="" type="checkbox"/>	Position	<input type="checkbox"/>	Position	String	-1	
<input checked="" type="checkbox"/>	Source	<input type="checkbox"/>	Source	String	-1	
<input checked="" type="checkbox"/>	Status	<input type="checkbox"/>	Status	String	-1	
<input checked="" type="checkbox"/>	Email	<input type="checkbox"/>	Email	String	-1	
<input checked="" type="checkbox"/>	Phone 1	<input type="checkbox"/>	Phone 1	String	-1	
<input checked="" type="checkbox"/>	Country	<input type="checkbox"/>	Country	String	-1	
<input checked="" type="checkbox"/>	Lead Class	<input type="checkbox"/>	Lead Class	String	-1	
<input checked="" type="checkbox"/>	Attribute	<input type="checkbox"/>	Attribute	String	-1	
<input checked="" type="checkbox"/>	Value	<input type="checkbox"/>	Value	String	-1	

Figure: The final scenario mapping

Import Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Import Leads with Attributes
* Screen Name: Leads
* Provider: Import Leads with Attributes
* Provider Object: Leads
Sync Type: Full

☒ Active ☐ Make Visible on the UI
Site Map Title:
Workspace:
Category:
Format Locale:

☐ Parallel Processing
☒ Break on Error
☒ Break on Incorrect Target
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS TARGET RESTRICTIONS

INSERT Show All Commands INSERT FROM... SUBSTITUTION LISTS

	Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
>	<input checked="" type="checkbox"/>	Lead Summary	<Key: ContactID>	<input type="checkbox"/>	=[Lead.ContactID]	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Lead Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Lead Summary	Lead ID -> Email	<input checked="" type="checkbox"/>	Email	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Lead Summary	Status	<input checked="" type="checkbox"/>	Status	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Contact Info -> Contact	First Name	<input type="checkbox"/>	=Substring([Name], InStr([Name], ' ')+2, InStrRev([Name], ' ')-InStr([Name], ' ')-2)	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Contact Info -> Contact	Last Name	<input type="checkbox"/>	=Substring([Name], 0, InStr([Name], ' '))	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Contact Info -> Contact	Account Name	<input type="checkbox"/>	Company Name	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Contact Info -> Contact	Job Title	<input type="checkbox"/>	Position	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Contact Info -> Contact	Email	<input checked="" type="checkbox"/>	Email	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Contact Info -> Contact	Phone 1	<input type="checkbox"/>	Phone 1	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	CRM Info -> CRM	Lead Class	<input checked="" type="checkbox"/>	Lead Class	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Contact Info -> Address	Country	<input checked="" type="checkbox"/>	Country	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Attributes	<Key: AttributeID>	<input type="checkbox"/>	=[Answers.AttributeID]	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Attributes	Attribute	<input type="checkbox"/>	Attribute	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Attributes	Value	<input checked="" type="checkbox"/>	Value	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Lead Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: The Attributes tab

Leads

Woodrow, Harrison - Academy Of Business & Computer Studies

NOTES FILES CUSTOMIZATION TOOLS ▾

← ↻ 📄 ↺ + 🗑️ 📁 ▾ ⏪ < > ⏩ OPEN ...

Lead ID: Woodrow, Harrison 🔍

Status: New

* Reason: Created ▾

Description:

Contact: 🔍 ✎

Business Account: 🔍 ✎

Owner: 🔍

Source: ▾

Source Campaign: 🔍

🚨 CONTACT INFO ACTIVITIES CRM INFO ATTRIBUTES RELATIONS CAMPAIGNS MARKETING LISTS OPPORTUNITIES

🔄 ⏮ ⏭

Attribute	Required	Value
> Number of Employees	<input type="checkbox"/>	100
Industry	<input checked="" type="checkbox"/>	Education

Lesson Summary

In this lesson, you have learned how to import records with attributes by using import scenarios. To import attributes, you performed the following actions on the Import Scenarios (SM206025) form:

1. Mapped the Attribute field of the Attributes object to the name of the attribute. (You did not need to specify the key command before the Attribute field. The system inserts the necessary key commands automatically.)
2. Mapped the Value field of the Attributes object to the attribute value. The Commit check box is selected automatically for the field.

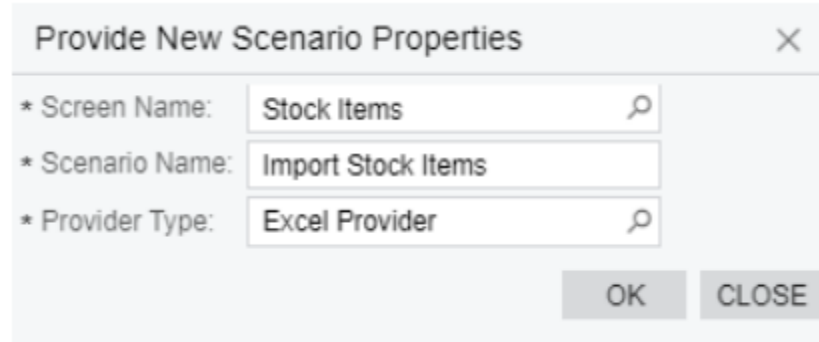
Lesson 3.1: Importing Records in the Simplified Way

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a simplified import scenario
- Import data by using the simplified import scenario

Figure: Provide New Scenario Properties dialog box



The image shows a dialog box titled "Provide New Scenario Properties" with a close button (X) in the top right corner. The dialog contains three required fields, each marked with an asterisk (*):

- * Screen Name: A text input field containing "Stock Items" with a magnifying glass icon on the right.
- * Scenario Name: A text input field containing "Import Stock Items".
- * Provider Type: A text input field containing "Excel Provider" with a magnifying glass icon on the right.

At the bottom right of the dialog, there are two buttons: "OK" and "CLOSE".

Figure: Import by Scenario form with the new simplified scenario saved

Import by Scenario

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

+ ↶ ↷ < > >| PREPARE IMPORT ...

* Name: Import Stock Items 🔍 Number of Records: 0 ☒ Break on Error

Screen Name: Stock Items ☒ Simple Scenario ☒ Break on Incorrect Target

Status: New ☐ Parallel Processing ☐ Discard Previous Result

PREPARED DATA **MAPPING** HISTORY DETAILS

🔄 + ✕ REFRESH FROM FILE |↔| ☒

🔍	📄	Active	Source Field / Value	* Target Object	Key	Field Name
>	🔍	📄	<input type="checkbox"/> Inventory ID		<input type="checkbox"/>	
	🔍	📄	<input type="checkbox"/> Description		<input type="checkbox"/>	
	🔍	📄	<input type="checkbox"/> Type		<input type="checkbox"/>	
	🔍	📄	<input type="checkbox"/> Valuation Method		<input type="checkbox"/>	
	🔍	📄	<input type="checkbox"/> Tax Category		<input type="checkbox"/>	
	🔍	📄	<input type="checkbox"/> Default WH		<input type="checkbox"/>	
	🔍	📄	<input type="checkbox"/> UOM		<input type="checkbox"/>	
	🔍	📄	<input type="checkbox"/> Item Class		<input type="checkbox"/>	

Figure: The final scenario mapping

Import by Scenario

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

📁 + ↶ ⏪ < > ⏩ PREPARE IMPORT ...

* Name: Number of Records: ☒ Break on Error

Screen Name: ☒ Simple Scenario ☒ Break on Incorrect Target

Status: ☐ Parallel Processing ☐ Discard Previous Result

PREPARED DATA **MAPPING** HISTORY DETAILS

🔄 + × REFRESH FROM FILE |⇌| ☒

📁	🔍	📄	Active	Source Field / Value	* Target Object	Key	Field Name
>	🔍	📄	<input checked="" type="checkbox"/>	Inventory ID	Stock Item Summary	<input checked="" type="checkbox"/>	Inventory ID
	🔍	📄	<input checked="" type="checkbox"/>	Description	Stock Item Summary	<input type="checkbox"/>	Description
	🔍	📄	<input checked="" type="checkbox"/>	Item Class	General -> Item Defaults	<input type="checkbox"/>	Item Class
	🔍	📄	<input checked="" type="checkbox"/>	Type	General -> Item Defaults	<input type="checkbox"/>	Type
	🔍	📄	<input checked="" type="checkbox"/>	Valuation Method	General -> Item Defaults	<input type="checkbox"/>	Valuation Method
	🔍	📄	<input checked="" type="checkbox"/>	Tax Category	General -> Item Defaults	<input type="checkbox"/>	Tax Category
	🔍	📄	<input checked="" type="checkbox"/>	UOM	General -> Unit of Measure	<input type="checkbox"/>	Base Unit
	🔍	📄	<input checked="" type="checkbox"/>	Default WH	General -> Item Defaults -> Warehouse Defaults	<input type="checkbox"/>	Default Warehouse

Lesson Summary

In this lesson, you have learned how to import records from a file by using a simplified import procedure. You have used a simplified scenario in a case when the data in the source file was ready for import into the system by a straightforward mapping of source fields to target fields. For more complex scenarios, we recommend that you use regular import scenarios that you create based on the data provider on the Import Scenarios (SM206025) form. You have performed a simplified import on the Import by Scenario (SM206036) form by performing the following actions:

1. Uploading a file that should be used for data import to the form
2. Specifying the settings of the simplified scenario
3. Mapping the fields of the external file to the Acumatica ERP fields
4. Importing the data

Lesson 4.1: Exporting Records

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a scenario for exporting master records
- Create a scenario for exporting master-detail records
- Create a scenario for exporting records with attributes
- Create a scenario for exporting records from a generic inquiry
- Export records by using the created scenarios

Figure: The final scenario mapping

Export Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Export AR Invoices * Screen Name: Invoices and Memos

☒ Active ☐ Make Visible on the UI

Detail Export Mode: Repeat Only Summary Fields ▾

☐ Export Only Mapped Fields

MAPPING SOURCE RESTRICTIONS

INSERT Show All Comm... ▾

INSERT FROM... SUBSTITUTION LISTS

	Active	*Source Object	*Field / Action Name	Commit	Target Field / Value	Ignore Error
	<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	<input type="checkbox"/>	=[Document DocType]	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	<input type="checkbox"/>	=[Document RefNbr]	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Type	<input checked="" type="checkbox"/>	=Invoice	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input checked="" type="checkbox"/>	=Every	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Type	<input type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Customer	<input type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Date	<input type="checkbox"/>	DATE	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Post Period	<input type="checkbox"/>	POST PERIOD	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Customer Order Nbr.	<input type="checkbox"/>	CUSTOMER REF NBR	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Description	<input type="checkbox"/>	DOC DESCRIPTION	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Balance (CurDocBal)	<input type="checkbox"/>	TOTAL AMOUNT	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Document Details	<Line Number>	<input type="checkbox"/>		<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Document Details	Branch	<input type="checkbox"/>	DESTINATION BRANCH	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Document Details	Transaction Descr.	<input type="checkbox"/>	LINE DESCRIPTION	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Document Details	Ext. Price	<input type="checkbox"/>	EXT PRICE	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Document Details	Account	<input type="checkbox"/>	ACCOUNT	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Document Details	Subaccount	<input type="checkbox"/>	SUBACCOUNT	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Financial Details -> Link to GL	Branch	<input type="checkbox"/>	ORIGINATING BRANCH	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	Note Text	<input checked="" type="checkbox"/>	=Exported	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Source restrictions

Export Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Export AR Invoices 🔍

* Screen Name: Invoices and Memos 🔍

* Provider: Import/Export AR Invoices 🔍

* Provider Object: AR Invoices 🔍

Sync Type: Full ▾

Detail Export Mode: Repeat Only Summary Fields ▾

☐ Export Only Mapped Fields

☐ Discard Previous Result

☒ Active ☐ Make Visible on the UI

Site Map Title: _____

Workspace: _____

Category: _____

Format Locale: _____ 🔍

MAPPING SOURCE RESTRICTIONS

Active	Brackets	* Source Object	* Field Name	* Condition	Is Relative	Value	Value 2	Brackets	Operator
<input checked="" type="checkbox"/>	-	Invoice Summary	Status	Equals	<input type="checkbox"/>	Open		-	And

Figure: Export Leads with Attributes data provider

Data Providers ☆

NOTES FILES (1) CUSTOMIZATION

GET FILE LINK

* Name: Export Leads with Attributes

* Provider Type: Excel Provider

☒ Active

PARAMETERS SCHEMA

Source Objects

Source Fields

Field	Key	Description	Data Type	Data Length	Command
Name	<input type="checkbox"/>	Name	String	-1	
Company Name	<input type="checkbox"/>	Company Name	String	-1	
Position	<input type="checkbox"/>	Position	String	-1	
Source	<input type="checkbox"/>	Source	String	-1	
Status	<input type="checkbox"/>	Status	String	-1	
Email	<input type="checkbox"/>	Email	String	-1	
Phone 1	<input type="checkbox"/>	Phone 1	String	-1	
Country	<input type="checkbox"/>	Country	String	-1	
Lead Class	<input type="checkbox"/>	Lead Class	String	-1	
Attribute	<input type="checkbox"/>	Attribute	String	-1	
Value	<input type="checkbox"/>	Value	String	-1	
Contact Method	<input type="checkbox"/>				

Figure: Export Leads with Attributes scenario

Export Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Export Leads with Attributes ⓘ ☒ Active ☐ Make Visible on the UI Detail Export Mode: Repeat Only Summary Fields ▾

* Screen Name: Leads ⓘ Site Map Title:

* Provider: Export Leads with Attributes ⓘ Workspace:

* Provider Object: Leads ⓘ Category:

Sync Type: Full ▾ Format Locale:

MAPPING SOURCE RESTRICTIONS

↺ + X INSERT Show All Comm... ↗ ↕ INSERT FROM... SUBSTITUTION LISTS |<|

ⓘ	🗑	Active	* Source Object	* Field / Action Name	Commit	Target Field / Value	Ignore Error
ⓘ	🗑	<input checked="" type="checkbox"/>	Lead Summary	<Key: ContactID>	<input type="checkbox"/>	=[Lead ContactID]	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Lead Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Lead Summary	Lead ID	<input checked="" type="checkbox"/>	=Every	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Lead Summary	Status	<input type="checkbox"/>	Status	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Contact Info -> Contact	=[LeadCurrent.FirstName]+'-'+[LeadCurrent.LastName]	<input type="checkbox"/>	Name	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Contact Info -> Contact	Job Title	<input type="checkbox"/>	Position	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Contact Info -> Contact	Account Name	<input type="checkbox"/>	Company Name	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Contact Info -> Contact	Email	<input type="checkbox"/>	Email	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Contact Info -> Contact	Phone 1	<input type="checkbox"/>	Phone 1	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	CRM Info -> CRM	Lead Class	<input type="checkbox"/>	Lead Class	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Lead Summary	Source	<input type="checkbox"/>	Source	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	CRM Info -> Contact Preferences	Contact Method	<input type="checkbox"/>	Contact Method	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Contact Info -> Address	Country	<input type="checkbox"/>	Country	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Attributes	<Key: AttributeID>	<input type="checkbox"/>	=[Answers.AttributeID]	<input type="checkbox"/>
ⓘ	🗑	<input checked="" type="checkbox"/>	Attributes	Attribute	<input type="checkbox"/>	Attribute	<input type="checkbox"/>
>	ⓘ	<input checked="" type="checkbox"/>	Attributes	Value	<input type="checkbox"/>	Value	<input type="checkbox"/>

Figure: Item Availability Data generic inquiry

Item Availability Data



Inventory ID: <input type="text"/>				
Drag column header here to configure filter				
Warehouse	Inventory ID	Description	Qty. On Hand	Qty. Available
> MAIN	AACOMPUT01	Acer Laptop Computer	150.00	150.00
MAIN	AALEGO500	Lego 500 piece set	1,999.00	1,977.00
MAIN	AAMACHINE1	Injection molding machine	130.00	127.00
MAIN	CONGRILL	Char-Broil Classic 480	200.00	193.00
MAIN	CONTABLE1	Folding Picnic Table 6 Foot	200.00	195.00
MAIN	HEADSET	Headset	40.00	40.00
MAIN	KEYBOARD	Computer keyboard	40.00	40.00
MAIN	LAPTOP12	Laptop 12"	20.00	20.00
MAIN	LAPTOP14	Laptop 14"	20.00	20.00
MAIN	LEATHCASE	Leather case for laptops 12"-15"	40.00	40.00
MAIN	MONITOR26	Monitor 26"	40.00	40.00
MAIN	MOUSE	Computer mouse	40.00	40.00
YOGI	SIMCARD	SIM card & contract	1,000.00	1,000.00

Figure: Schema of the created provider

Data Providers ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ GET FILE LINK

• Name: Export Item Availability Data 🔍

• Provider Type: Excel Provider 🔍

☒ Active

PARAMETERS SCHEMA

Source Objects

🔄 + × FILL SCHEMA OBJECTS ⇨

📄	🗑️	📄	Activi	Object	Command
>	📄	🗑️	<input checked="" type="checkbox"/>	ItemQuantities	

Source Fields

🔄 + × FILL SCHEMA FIELDS EDIT COMMAND TOGGLE ACTIVATION |←| 🗑️

📄	🗑️	📄	Activ	Field	Key	Description	Data Type	Data Length	Command
>	📄	🗑️	<input checked="" type="checkbox"/>	Warehouse	<input type="checkbox"/>	Warehouse	String	-1	
	📄	🗑️	<input checked="" type="checkbox"/>	InventoryID	<input type="checkbox"/>	InventoryID	String	-1	
	📄	🗑️	<input checked="" type="checkbox"/>	Description	<input type="checkbox"/>	Description	String	-1	
	📄	🗑️	<input checked="" type="checkbox"/>	QuantityAvailable	<input type="checkbox"/>	QuantityAvailable	String	-1	
	📄	🗑️	<input checked="" type="checkbox"/>	QuantityOnHand	<input type="checkbox"/>	QuantityOnHand	String	-1	

Figure: Export Item Availability Data scenario

Export Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Export Item Availability Data

* Screen Name: Item Availability Data

* Provider: Export Item Availability Data

* Provider Object: ItemQuantities

Sync Type: Full ▾

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:

Detail Export Mode: Repeat Only Summary Fields ▾

☐ Export Only Mapped Fields

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS

⌂ + X INSERT Show All Commans... ▾ ↑ ↓ INSERT FROM... SUBSTITUTION LISTS |⇄|

Active	Source Object	Field / Action Name	Commit	Target Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Filter	Inventory ID	<input checked="" type="checkbox"/>	='AALEGO500'	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	<Key: INSiteStatus_siteID>	<input type="checkbox"/>	=[Results.INSiteStatus_siteID]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	<Key: INSiteStatus_inventoryID>	<input type="checkbox"/>	=[Results.INSiteStatus_inventoryID]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	Inventory ID	<input type="checkbox"/>	InventoryID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	Description	<input type="checkbox"/>	Description	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	Warehouse	<input type="checkbox"/>	Warehouse	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	Qty. Available	<input type="checkbox"/>	QuantityAvailable	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	Qty. On Hand	<input type="checkbox"/>	QuantityOnHand	<input type="checkbox"/>

Lesson Summary

In this lesson, you have learned how to export master records and master-detail records from Acumatica ERP. You have done the following:

- 1. Created a data provider for the target data source
- 2. Developed an understanding of the sequence of actions to be performed on an Acumatica ERP form to select a record for export
- 3. Created an export scenario that uses the created data provider and reproduces the sequence of actions on the form in the scenario mapping
- 4. Exported data records by using the created scenario

When creating the mapping for export scenarios on the Mapping tab of the Export Scenarios (SM207025) form, you have learned to implement the following guidelines:

- • The key fields must be mapped first.
- • For key fields, you can use the =Every command to select all records available in the system for export.
- • If you change the values of the exported record, you have to select the Commit check box for each field for which you change the value.
- • You should finish a scenario for data export with <Action: Save> if you change the values of some fields during export.

Day 4

Lesson 4.2: Modifying Records By Using Export Scenarios

Learning Objectives

In this lesson, you will learn how to do the following:

- Update existing records by using export scenarios
- Apply actions to exported records
- Delete records by using export scenarios

Figure: Update Statement Cycle export scenario

Export Scenarios

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: ☒ Active ☐ Make Visible on the UI

* Screen Name: Site Map Title:

* Provider: Workspace:

* Provider Object: Category:

Sync Type: Format Locale:

Detail Export Mode: ☐ Export Only Mapped Fields ☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS

⌂ + X INSERT Show All Comm... ↑ ↓ INSERT FROM... SUBSTITUTION LISTS |<|


Active	* Source Object	* Field / Action Name	Commit	Target Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Customer Summary	<Key: AcctCD>	<input type="checkbox"/>	=[BAccount.AcctCD]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input checked="" type="checkbox"/>	=Every	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	Customer ID	<input type="checkbox"/>	CUSTOMER ID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Financial -> Financial Settings	Statement Cycle ID	<input type="checkbox"/>	=EOW	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Customer Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>


Figure: Source restrictions


Export Scenarios ☆


NOTES FILES (1) CUSTOMIZATION TOOLS ▾



VIEW SCREEN

* Name: Update Statement Cycle  ☒ Active ☐ Make Visible on the UI

* Screen Name: Customers  Site Map Title:

* Provider: Import/Export Customers  Workspace:

* Provider Object: CustomersMasterFile.csv  Category:






Sync Type: Full  Format Locale: 

Detail Export Mode: Repeat Only Summary Fields ▾

☐ Export Only Mapped Fields

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS






  	Active	Brackets	* Source Object	* Field Name	* Condition	Is Relative	Value	Value 2	Brackets ▾	Operator
>  	<input checked="" type="checkbox"/>	-	Customer Summary	Customer ID	Is Between	<input type="checkbox"/>	C000000092	C000000125	-	And

Figure: Mapping of the Recalculate Prices in AR Invoices export scenario

Export Scenarios

NOTES FILES (3) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Recalculate Prices in AR Invoices ☒ Active ☐ Make Visible on the UI
* Screen Name: Invoices and Memos
* Provider: Import/Export AR Invoices
* Provider Object: AR Invoices
Sync Type: Full
Site Map Title:
Workspace:
Category:
Format Locale:

Detail Export Mode: Repeat Only Summary Fields
☐ Export Only Mapped Fields
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS

INSERT Show All Comm... ↑ ↓ INSERT FROM... SUBSTITUTION LISTS

Active	Source Object	Field / Action Name	Commit	Target Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	<input type="checkbox"/>	= [Document.DocType]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	<input type="checkbox"/>	= [Document.RefNbr]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Type	<input checked="" type="checkbox"/>	= 'Invoice'	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input checked="" type="checkbox"/>	= Every	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Type	<input type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Dialog Answer>	<input checked="" type="checkbox"/>	= 'Yes'	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Recalculate Prices	OverrideManualPrices	<input checked="" type="checkbox"/>	= 'True'	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Recalculate Prices> (RecalculateDiscountsAction)	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: OK>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	Detail Total	<input type="checkbox"/>	TOTAL AMOUNT	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Invoice Summary	<Action: Save>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Source restriction

Export Scenarios NOTES FILES (1) CUSTOMIZATION TOOLS

VIEW SCREEN

* Name: Recalculate Prices in AR Invoices ☒ Active ☐ Make Visible on the UI
* Screen Name: Invoices and Memos
* Provider: Import/Export AR Invoices
* Provider Object: AR Invoices
Sync Type: Full
Site Map Title:
Workspace:
Category:
Format Locale:

Detail Export Mode: Repeat Only Summary Fields
☐ Export Only Mapped Fields
☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS

Active	Brackets	* Source Object	* Field Name	* Condi	Is Relative	Value	Value 2	Bracke	Operat
<input checked="" type="checkbox"/>	-	Invoice Summary	Status	Equals	<input type="checkbox"/>	On Hold		-	And

Figure: Delete On Hold Invoices export scenario mapping

Export Scenarios ☆

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

VIEW SCREEN

* Name: Delete On Hold Invoices

* Screen Name: Invoices and Memos

* Provider: Import/Export AR Invoices

* Provider Object: AR Invoices

Sync Type: Full ▾

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:

Detail Export Mode: Repeat Only Summary Fields ▾

☐ Export Only Mapped Fields

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS

⌂ + X INSERT Show All Comm... ↑ ↓ INSERT FROM... SUBSTITUTION LISTS |<|

⌂	⌂	⌂	Active	* Source Object	* Field / Action Name	Commit	Target Field / Value	Ignore Error
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	<Key: DocType>	<input type="checkbox"/>	= [Document.DocType]	<input type="checkbox"/>
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	<Key: RefNbr>	<input type="checkbox"/>	= [Document.RefNbr]	<input type="checkbox"/>
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	Type	<input checked="" type="checkbox"/>	= 'Invoice'	<input type="checkbox"/>
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input checked="" type="checkbox"/>	= Every	<input type="checkbox"/>
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	Type	<input type="checkbox"/>	DOC TYPE	<input type="checkbox"/>
⌂	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	Reference Nbr.	<input type="checkbox"/>	INVOICE REF NBR	<input type="checkbox"/>
>	⌂	⌂	<input checked="" type="checkbox"/>	Invoice Summary	<Action: Delete>	<input type="checkbox"/>		<input type="checkbox"/>

Figure: Source restrictions

Export Scenarios NOTES FILES (3) CUSTOMIZATION TOOLS ▾

📄 ↺ + 🗑️ 📄 ▾ ⌂ < > >| VIEW SCREEN

* Name:

* Screen Name:

* Provider:

* Provider Object:

Sync Type:

☒ Active ☐ Make Visible on the UI

Site Map Title:

Workspace:

Category:

Format Locale:

Detail Export Mode:

☐ Export Only Mapped Fields

☐ Discard Previous Result

MAPPING SOURCE RESTRICTIONS

🔄 + × ⌂ 🗑️

	Active	Brackets	* Source Object	* Field Name	* Condit	Is Relative	Value	Value 2	Brackets	Operator
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	Invoice Summary	Status	Equals	<input type="checkbox"/>	On Hold	-	And
>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	Invoice Summary	Date	Equals	<input type="checkbox"/>	3/15/2021	-	And

Lesson Summary

In this lesson, you have learned how to modify the data in the system by using export scenarios. You can use export scenarios for data modification if you need to mass-update records that satisfy some condition and you do not have the list of IDs of these records. You can use export scenarios to update the fields of the records, apply an action to the records, or delete unnecessary records.

Lesson 5.1: Optimizing the Performance of Data Import

Learning Objectives

In this lesson, you will learn how to do the following:

- Optimize the performance of import scenarios.

Figure: Processing time before optimization

Import by Scenario

NOTES Executing. Press to abort
00:01:00 CANCEL

+ - < > PREPARE IMPORT ...

* Name: Import Purchase Orders Number of Records: 328 ☒ Break on Error
Screen Name: Purchase Orders ☐ Simple Scenario ☒ Break on Incorrect Target
Status: Partially Processed ☐ Parallel Processing ☐ Discard Previous Result

PREPARED DATA HISTORY DETAILS

REPLACE ADD SUBSTITUTION TOGGLE ACTIVATION CLEAR ACTIVATION UNTIL ERROR TOGGLE PROCESSING CLEAR ERRORS All Records

	Number	Active	Processed	Error	Type	VendorID	Date	DocumentReference	Warehouse	VendorInventoryID	Quantity
>	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000008	9/15/2022 12:00:00 AM	1	MAIN	012345	110
	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	2	MAIN	AAM0001	240
	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	2	MAIN	CG0258	130
	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000014	9/20/2022 12:00:00 AM	3	MAIN	LEGO500PS	350
	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	4	MAIN	256489	145
	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	4	MAIN	123123	75
	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	4	MAIN	012345	130
	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000027	9/25/2022 12:00:00 AM	5	MAIN	123456789	600
	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000008	9/15/2022 12:00:00 AM	6	MAIN	012345	110
	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	7	MAIN	AAM0001	240
	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	7	MAIN	CG0258	130
	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000014	9/20/2022 12:00:00 AM	8	MAIN	LEGO500PS	350
	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	9	MAIN	256489	145
	14	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	9	MAIN	123123	75
	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	9	MAIN	012345	130
	16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000027	9/25/2022 12:00:00 AM	10	MAIN	123456789	600

Figure: Processing time after optimization

Import by Scenario

NOTES: Executing. Press to abort. 00:00:55 CANCEL

* Name: Import Purchase Orders Number of Records: 328 ☒ Break on Error
Screen Name: Purchase Orders ☐ Simple Scenario ☒ Break on Incorrect Target
Status: Partially Processed ☐ Parallel Processing ☐ Discard Previous Result

PREPARED DATA HISTORY DETAILS

REPLACE ADD SUBSTITUTION TOGGLE ACTIVATION CLEAR ACTIVATION UNTIL ERROR TOGGLE PROCESSING CLEAR ERRORS All Records

Number	Active	Processed	Error	Type	VendorID	Date	DocumentReference	Warehouse	VendorInventoryID	Quantity
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000008	9/15/2022 12:00:00 AM	1	MAIN	012345	110
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	2	MAIN	AAM0001	240
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	2	MAIN	CG0258	130
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000014	9/20/2022 12:00:00 AM	3	MAIN	LEGO500PS	350
5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	4	MAIN	256489	145
6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	4	MAIN	123123	75
7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	4	MAIN	012345	130
8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000027	9/25/2022 12:00:00 AM	5	MAIN	123456789	600
9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000008	9/15/2022 12:00:00 AM	6	MAIN	012345	110
10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	7	MAIN	AAM0001	240
11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000016	9/18/2022 12:00:00 AM	7	MAIN	CG0258	130
12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000014	9/20/2022 12:00:00 AM	8	MAIN	LEGO500PS	350
13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	9	MAIN	256489	145
14	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	9	MAIN	123123	75
15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Standard	V000000008	9/19/2022 12:00:00 AM	9	MAIN	012345	130
16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Normal	V000000027	9/25/2022 12:00:00 AM	10	MAIN	123456789	600

Lesson Summary

In this lesson, you have learned how to improve the performance of an import scenario. To optimize the performance of a scenario that imports a large number of purchase orders, you have cleared the Commit check box for certain fields in the mapping of the scenario on the Import Scenarios (SM206025) form.

Lesson 6.1: Scheduling Data Import and Export

Learning Objectives

In this lesson, you will learn how to do the following:

- Schedule data import and export.

Figure: The list of import scenarios with the scenario selected for scheduling

Process Import Scenarios ☆

CUSTOMIZATION TOOLS ▾

PROCESS PROCESS ALL 3

Operation: Prepare & Import Break on Error Break on Incorrect Target Skip Headers

Validate Data (No Saving) Save If Data Is Valid 1

HISTORY PREPARED DATA

Name	Screen Name	Provider	Sync Type	Status	Number of Records	Prepared On	Completed On
IMPORT PR WC Comp Codes		Import PR WC Comp Codes	Full	Processed	4	1/7/2021 7:40 PM	1/7/2021 7:41 PM
IMPORT PR WC Comp Codes Rates		Import PR WC Comp Codes	Full	Processed	1	9/8/2020 12:18 PM	9/8/2020 12:20 PM
Import PR Work Locations		Import PR Work Locations	Full	Processed	2	9/8/2020 2:16 PM	9/8/2020 2:16 PM
Import Project WIP	Projects	Import/Export Project WIP	Full	Partially Processed	58	10/3/2018 11:25 AM	5/18/2018 9:09 AM
Import Purchase Orders	Purchase Orders	Import Purchase Orders from Excel	Full	Processed	328	5/6/2021 1:41 PM	5/6/2021 1:42 PM
Import Report Definitions	Report Definitions	Report Definitions Provider	Full	Processed	3	11/5/2014 6:19 AM	11/5/2014 6:19 AM
Import Shipments	Shipments	Import Shipments	Full	New	0		
Import Stock Items	Stock Items	Import Stock Items	Full	Processed	35	5/5/2021 1:17 PM	5/5/2021 1:17 PM
Import User from Salesforce	Users	Salesforce Sync	Full	Processed	5	10/20/2017 9:25 AM	10/20/2017 9:28 AM
Import Work Centers		Import Work Centers	Full	New	0		
Old Import Leads from HubSpot	Leads	HubSpot	Full	New	0		
Release AR Invoices	Invoices and Memos	Import/Export AR Invoices	Full	Processed	44	5/4/2021 8:47 AM	5/4/2021 9:10 AM
Release IMP PR Paychecks		Import PR Paychecks	Full	Prepared	2	6/19/2020 10:51 AM	6/16/2020 5:07 PM
Statement Import - Eagle Bank		Statement Import Provider - Eagle Bank	Full	New	0		
Update AR Invoices by Line Description	Invoices and Memos	Import/Export AR Invoices	Full	New	0		
Update AR Invoices by Line Number	Invoices and Memos	Import/Export AR Invoices	Full	Processed	57	4/30/2021 1:23 PM	4/30/2021 1:23 PM
Update Customers	Customers	Import/Export Customers	Incremental - New Only	Processed	34	4/29/2021 2:34 PM	4/29/2021 2:35 PM
Update Customers by Email	Customers	Import/Export Customers	Full	Processed	34	4/30/2021 7:00 AM	4/30/2021 7:00 AM
Update Customers by Name	Customers	Import/Export Customers	Full	Processed	34	4/30/2021 6:51 AM	4/30/2021 6:51 AM
Update Purchase Orders	Purchase Orders	Import Purchase Orders from Excel	Full	Processed	8	5/4/2021 2:31 PM	5/4/2021 2:31 PM

Figure: Schedule tab

Automation Schedules

Automation Schedules

NOTES FILES CUSTOMIZATION TOOLS

VIEW SCREEN VIEW HISTORY

Schedule ID: <NEW> ☒ Active

* Description: Update Customers Schedule

* Screen ID: Process Import Scenarios * Action Name: Process All

DETAILS **SCHEDULE** CONDITIONS FILTER VALUES

SCHEDULE TYPE

☒ Daily
☐ Weekly
☐ Monthly
☐ By Financial Period

SCHEDULE DETAILS

* Next Execution Date: 11/3/2022

Every: 10 Day(s)

EXECUTION TIME

Starts On: 1:30 AM

Stops On:

Every: 00:00

* Next Execution Time: 1:30 AM

☐ Exact Time

Figure: The list of active schedules

Automation Schedule Statuses CUSTOMIZATION TOOLS ▾

Automation Schedule Statuses												
VIEW SCREEN VIEW HISTORY INITIALIZE SCHEDULER												
⌵	⌵	⌵	Status	* Screen ID	* Description	Active	* Starts On	Expires On	Time Zone	Last Executed	Last Execution Result	Next Execution Date
>	⌵	⌵		SM.20.25.30	Update Customer Master File Schedule	<input checked="" type="checkbox"/>	10/24/2022		(GMT-05:0...			11/3/2022 1:00 AM
	⌵	⌵		SM.20.60.35	Update Customers Schedule	<input checked="" type="checkbox"/>	10/24/2022		(GMT-05:0...			11/3/2022 1:30 AM
	⌵	⌵		SM.50.70.10	Send/Receive Emails	<input type="checkbox"/>	3/19/2020		(GMT) Uni...			1/7/2021 9:55 AM

Figure: Processed record on the History tab

Import by Scenario ★

NOTES FILES (1) CUSTOMIZATION TOOLS ▾

📄 + ↶ ⏪ < > ⏩ PREPARE IMPORT ...

★ Name: Number of Records: ☒ Break on Error

Screen Name: ☐ Simple Scenario ☒ Break on Incorrect Target

Status: ☐ Parallel Processing ☐ Discard Previous Result

PREPARED DATA **HISTORY** DETAILS

🔄 ⏮ ⏭

📅	Status Date	Status	Number of Records	Version	Description
>	10/24/2022 3:04 PM	Prepared	1	3	Imported from 'CustomersMasterFile_Checked.csv' file.
	10/24/2022 3:04 PM	Processed	1	3	

Figure: The list of scenarios with the selected scenario to schedule

Process Export Scenarios CUSTOMIZATION TOOLS ▾

☐ Skip Headers

Operation:

		Name	Screen Name	Provider	Sync Type	Status	Number of Records	Prepared On	Completed On
	<input type="checkbox"/>	Export Leads to HubSpot Realtime	Leads	HubSpot Enhanced Provider	Full	Partially Processed	23	10/15/2021 2:3	
>	<input checked="" type="checkbox"/>	Export Leads with Attributes	Leads	Export Leads with Attributes	Full	Partially Processed	27	10/15/2021 2:5	10/15/2021 2:38 PM
	<input type="checkbox"/>	Export Marketing Lists to HubSpot	Marketing Lists	HubSpot Enhanced Provider	Incremental - All Records	Partially Processed	0	10/15/2021 2:3	
	<input type="checkbox"/>	Export Non-Stock Item to Salesforce	Non-Stock Items	Salesforce Sync	Full	Partially Processed	8	10/15/2021 2:3	
	<input type="checkbox"/>	Export Opportunity to Salesforce	Opportunities	Salesforce Sync	Full	New	0		
	<input type="checkbox"/>	Export PR Payment to ACH		ACHExportProviderDL	Full	Partially Processed	0	10/15/2021 2:3	12/11/2020 5:07 PM
	<input type="checkbox"/>	Export PR Payment to ACH Balanced		ACHBalancedProviderDL	Full	Partially Processed	0	10/15/2021 2:3	12/11/2020 5:25 PM
	<input type="checkbox"/>	Export Project WIP		Import/Export Project WIP	Full	Processed	10	9/26/2018 4:58	9/26/2018 5:00 AM
	<input type="checkbox"/>	Export Stock Item to Salesforce	Stock Items	Salesforce Sync	Full	Partially Processed	48	10/15/2021 2:3	
	<input type="checkbox"/>	Old Export Leads to HubSpot	Leads	HubSpot	Incremental - All Records	Partially Processed	0	10/15/2021 2:3	
	<input type="checkbox"/>	Recalculate Prices in AR Invoices	Invoices and Memos	Import/Export AR Invoices	Full	Processed	1	11/12/2021 2:3	11/12/2021 2:30 AM
	<input type="checkbox"/>	Update Statement Cycle	Customers	Import/Export Customers	Full	Processed	34	11/12/2021 2:3	11/12/2021 2:30 AM

Figure: Schedule tab

Automation Schedules

Automation Schedules

NOTES FILES CUSTOMIZATION TOOLS

VIEW SCREEN VIEW HISTORY

Schedule ID: <NEW> ☒ Active

* Description: Export Leads with Attributes Schedule

* Screen ID: Process Export Scenarios * Action Name: Process All

DETAILS **SCHEDULE** CONDITIONS FILTER VALUES

SCHEDULE TYPE

☐ Daily

☒ Weekly

☐ Monthly

☐ By Financial Period

SCHEDULE DETAILS

* Next Execution Date: 10/28/2022

Every: 1 Week(s)

☐ Sunday ☐ Wednesday ☐ Saturday

☐ Monday ☐ Thursday

☐ Tuesday ☒ Friday

EXECUTION TIME

Starts On: 2:30 AM

Stops On:

Every: 00:00

* Next Execution Time: 2:30 AM

☐ Exact Time

Lesson Summary

In this lesson, you have learned how to schedule file synchronization between the system and the external source, and how to schedule import and export scenarios to be run. To configure the scheduled synchronization, you have done the following:

1. Created an import scenario that loads data from the needed file, and an export scenario that saves data to a file.
2. Assigned the created scenario to an automation schedule.
3. Configured synchronization between a file in Acumatica ERP and a file from the network resource.
4. Scheduled the synchronization of files. For the scheduled import, you have learned to run the file synchronization and then import the scenario. For the scheduled export, you have learned to first run the export scenario and then run the synchronization of files.



Thank you!

Omar Ghazi